

CYNGOR DEFNYDDWYR



CONSUMER COUNCIL FOR



On behalf of CCWater.

Water Matters

Household customers' views
on their water & sewerage
services 2018

June 2019



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Consumer Council for Water: Water Matters 2018

Foreword

CCWater has been tracking customers' views on their water companies since 2011. Generally, the results show that, over that period, customers tend to view the water industry in a positive light. And customers tend to trust their water companies more than they trust their energy companies. However, perceptions of fairness and satisfaction with value for money of water and sewerage services, have flat-lined for a number of years at a level that can be improved. We are also disappointed that satisfaction with overall water and sewerage services has fallen significantly, this year.

Last year, we published a companion 'Highlights' report¹ where we looked at customers' views on value for money and fairness in greater detail. These are broadly influenced by the customers' wider experiences. As views on value for money and fairness of charges have not improved this year, we decided to look at these two issues again, in this year's Highlights report², to provide insight into what water companies can do to take themselves off the 'stable' plateau and make real improvements for their customers. This time, we have analysed the problem further and looked at the views of neutral customers, to provide new insight into what companies can do to improve how they communicate and interact with these customers so that they have a more positive perception of their company. This is part of our ongoing campaign to put pressure on water companies that perform poorly.

This is the third year that we have asked customers for their views on the likelihood of water being available in the longer term without restriction. Confidence has dropped significantly over this time. The Highlights Report also examines how this is especially the case in areas of serious water stress, where there is a tendency for more customers to be neutral about how they feel about value for money of services and fairness.

Water companies need to look further into these issues with their customers. They cannot be complacent about their customers' views overall. The insight in our Water Matters research should be seen as a starting point, not a finishing point, and companies need to continue to improve the level of information and support that they provide their customers, while being clear about the challenges that they face as the pressures on water resources grow.

The industry must start to address these issues before the trends start to decline at a pace that cannot be managed. We will be discussing the data with companies throughout the year, adding insight where we can. We will shortly be publishing a document with a number of top tips to help companies increase customer satisfaction with value for money and the fairness of their bills. Our next Water Matters report will reveal whether any progress has been made.

Dr Mike Keil
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Consumer Council for Water

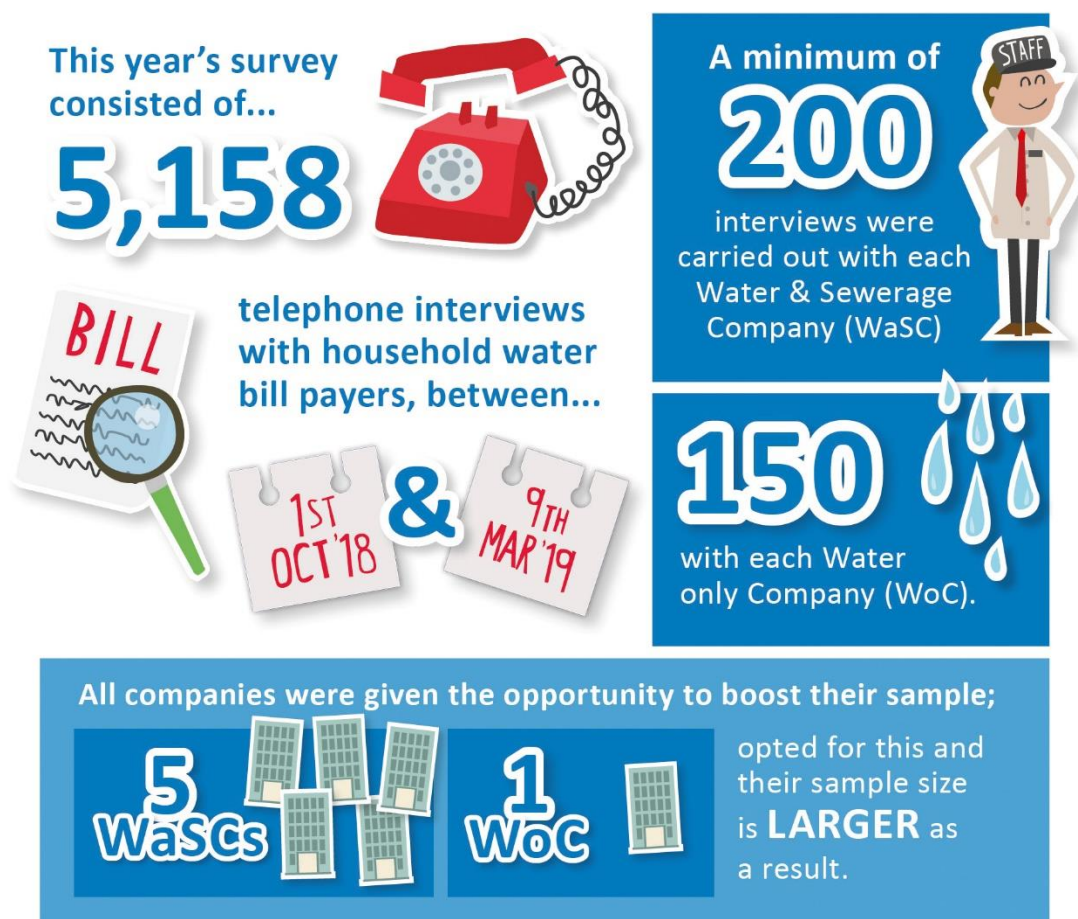
¹ <https://www.ccwater.org.uk/wp-content/uploads/2018/07/Water-Matters-Highlights-Report-2017.pdf>

² <https://www.ccwater.org.uk/research/water-matters-household-customers-views-of-their-water-and-sewerage-services-2018/>

Executive Summary

Every year since 2006, the Water Matters survey has asked a representative sample of water bill payers from households in England and Wales for their views and experiences of their water, sewerage services, and related charges.

Figure 1. Overview of methodology



Footnote: Companies are given the opportunity to boost their sample size, as the larger the sample size, the smaller the confidence interval / margin of error (i.e. the surer a company can be that the data truly reflects the opinions of their customers). Data is weighted, based on total household water connections, so despite companies boosting, the data at national levels is still representative.

Customers' views are described for England and Wales, for England and Wales separately, and by each water company³. This includes eight-year trend analysis⁴ to determine the direction of travel – upward trend, flat or downward trend – for each measure.

³ The views of customers of specific water companies are in the data report which follows.

⁴ Trends are analysed over the last eight years from 2011, as this is the first year that company specific data is available from. The trend analysis is only conducted when data exists for all of the previous eight years & when the question format, routing & text has remained the same over this entire period.

Key findings

Satisfaction with water and sewerage services

Satisfaction with water services has dropped significantly since 2017. There is also a significant fall in confidence that water supplies will be available in the longer term without restriction since 2017.

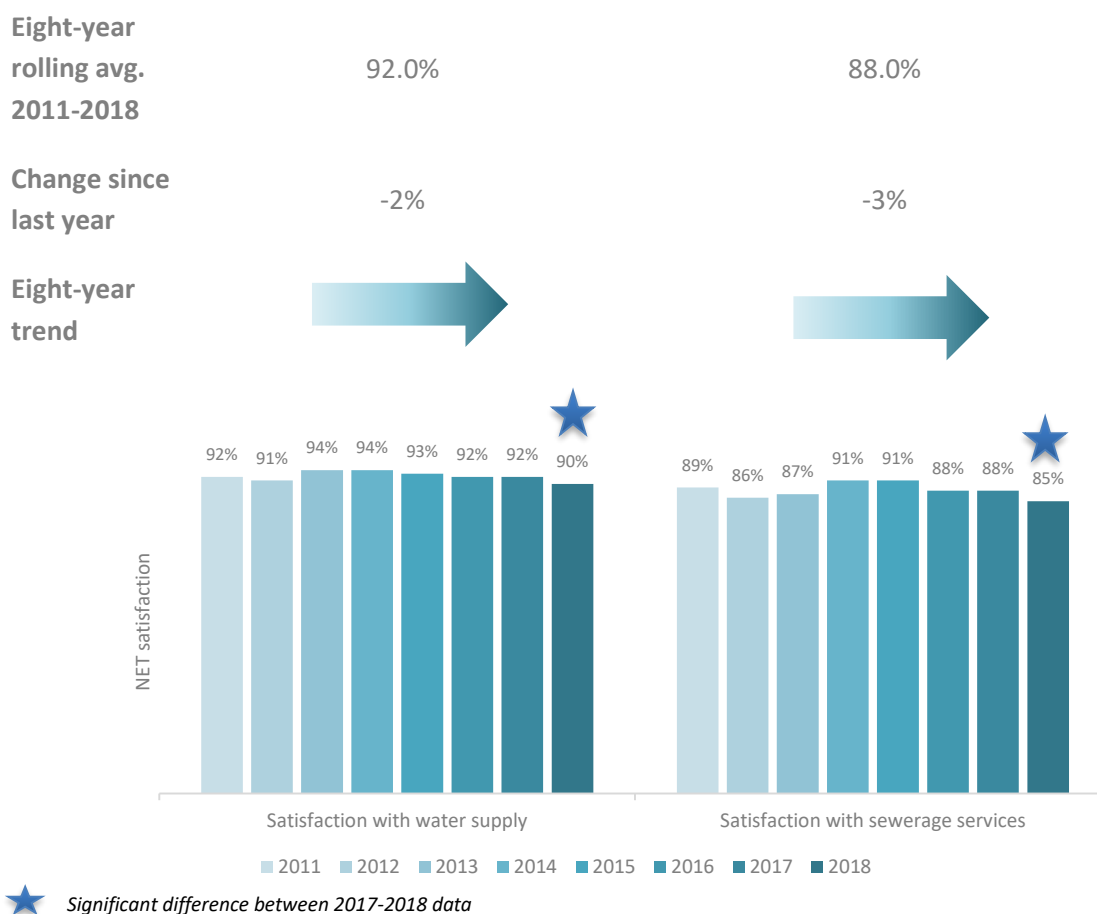
- In 2018, 90 % of customers in England and Wales are satisfied with their water supply; satisfaction has been consistent over the last eight years (Figure 2); however, it has dropped significantly since 2017 (92 %). To put this into context, customer satisfaction with services from comparator utilities⁵ has also fallen significantly since 2017 and customers are still more satisfied with their water service than with any other provider.
- Overall satisfaction with water supply is significantly higher in Wales compared to England in 2018 (94 % vs. 90 % for water respectively).
- Satisfaction levels for the different aspects of water supply ranges from 87 % - 97 % satisfaction, apart from 'hardness / softness' of water which is consistently lower (66 % satisfied in 2018). Satisfaction with the reliability of water supply has fallen significantly since 2017 (95% in 2018 vs 97% in 2017).
- Just under three-quarters (73 %) of customers in England and Wales are confident that their water supply will be available in the longer term without being subject to hosepipe bans or other restrictions on use. However, this has dropped significantly from 77 % in 2017 suggesting there is growing consumer awareness of the potential impact of climate change on water supply.

Satisfaction with sewerage services has dropped significantly since 2017.

- In 2018, 85 % of customers in England and Wales are satisfied with their sewerage services. Satisfaction has been consistent over the last eight years (Figure 2); however, it has dropped significantly since 2017 (88 % satisfied). Customers are more satisfied with their sewerage service than they are with their landline, broadband and council services. Customers are more satisfied with their energy services (gas and electricity) and their water service, than they are with their sewerage service.
- Satisfaction with sewerage services is significantly higher in Wales compared to England in 2018 (90 % vs. 85 % respectively).
- Satisfaction levels with different elements of sewerage services ranges from 71 % to 81 % (reducing smells, maintaining sewers and drains, cleaning waste water and minimising sewer flooding), although minimisation of sewer flooding has dropped significantly in 2018 (from 79 % in 2017 to 76 % in 2018). All eight-year trends are flat.

⁵ Including Electricity, Gas, Telephone Landline, Broadband and Council services.

Figure 2. Overall satisfaction with water and sewerage services⁶



Care and trust

Just over two thirds of customers believe that water companies care about the services they provide; water companies are thought to care more about their services than energy companies

- 69 % of customers across England and Wales agree that their water company cares about the services they provide. The overall eight-year trend for England and Wales remains flat (Figure 3).
- Customers in Wales are significantly more likely (78 %) than those in England (68 %) to agree that their company cares.
- Water companies are thought to care significantly more about services than energy companies (69 % vs. 60 % respectively for 2018).

Customers' trust in water companies has increased since 2011 and is greater than for energy companies.

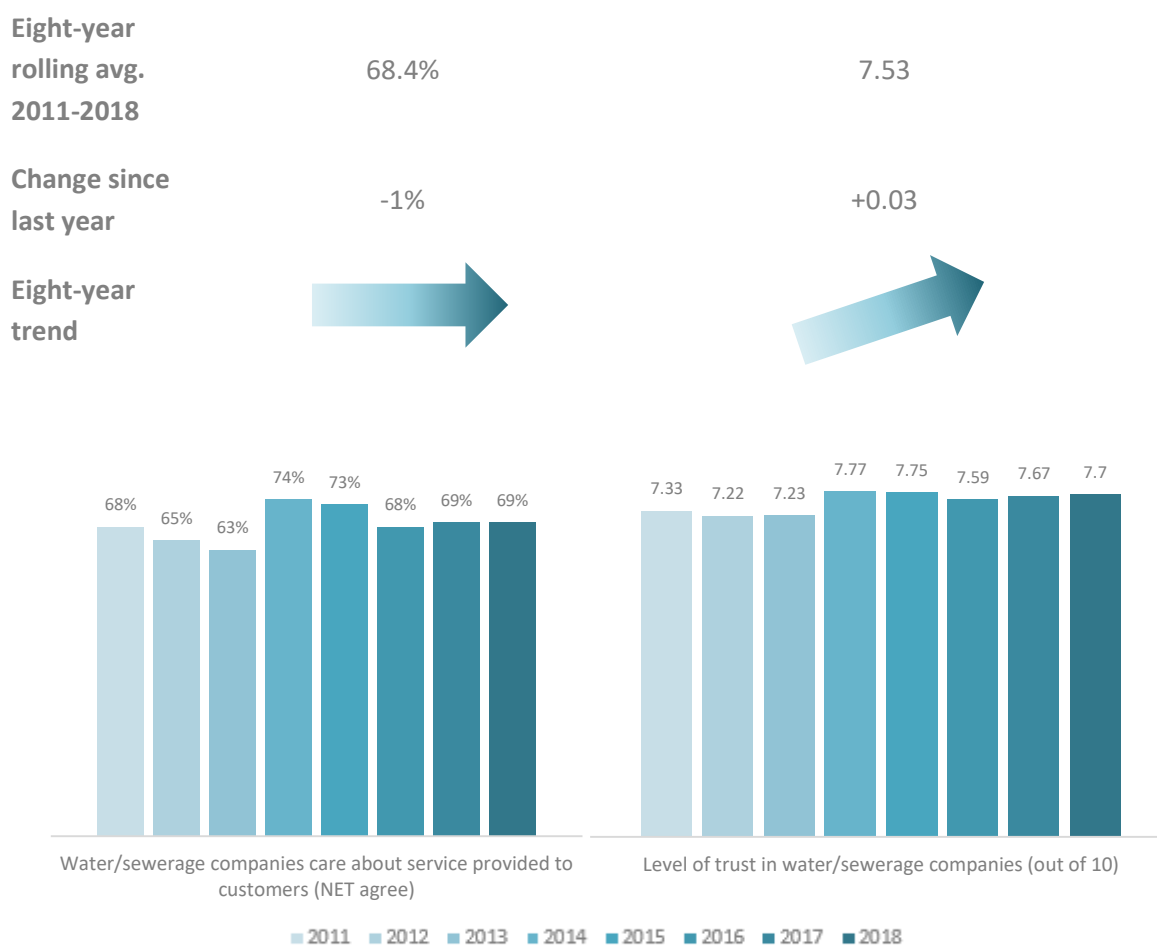
- Trust in water companies has increased over the last eight years, from 7.33 in 2011 to 7.70⁷ (maximum of 10) in 2018 (Figure 3).

⁶ The rolling eight-year averages are calculated based on the total valid base of weighted data at each time point. The eight-year trends are assessed using the Mann-Kendall method (Mann 1945, Kendall 1975). The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data.

⁷ Question is rated on a scale from 1 to 10, where 1 is 'do not trust them at all' to 10 'completely trust them'. The figure reported here is an average of all trust scores.

- Trust shows an improving trend in both England and Wales, although trust is significantly higher in Wales than in England (8.18 vs. 7.67 respectively).
- Water companies are still more trusted than energy companies (7.70 vs. 7.18 respectively).

Figure 3: Care and trust in water/sewerage companies



Value for money

Satisfaction with value for money of water services is consistent with 2017 and the eight-year trend is flat.

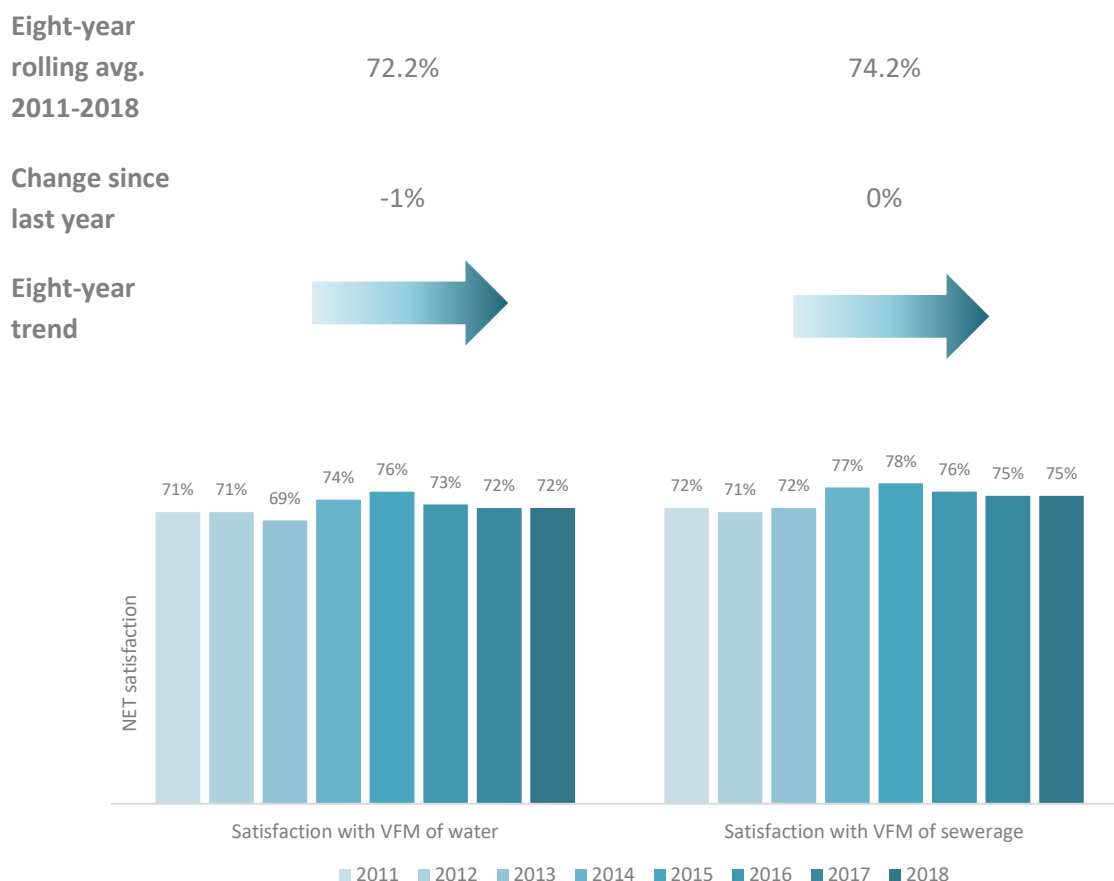
- 72 % of customers in England and Wales are satisfied with the value for money of their water services. Satisfaction is the same as in 2017 and the eight-year trend has remained flat (Figure 4).
- Customers in Wales are significantly more satisfied with the value for money of their water services than customers in England (82 % vs. 71 % respectively).

Satisfaction with value for money of sewerage services is the same as 2017 and the eight-year trend is flat.

- 75 % of customers in England and Wales are satisfied with the value for money of their sewerage services. Satisfaction is also the same as in 2017 (as it is for water) and the eight-year trend is flat (Figure 4).
- Customers in Wales are significantly more satisfied with the value for money of their sewerage services than those in England (82 % vs. 74 % respectively).

- To put these figures in context, customers are more satisfied with the value for money of their water and of their sewerage services than services of all other utility providers apart from landline services (landline services 75 %, electricity 71 %, gas 71 %, broadband 67 %, and council services 59 %). Satisfaction with value for money of all other utility providers has dropped significantly this year.

Figure 4: Satisfaction with value for money of water and sewerage services

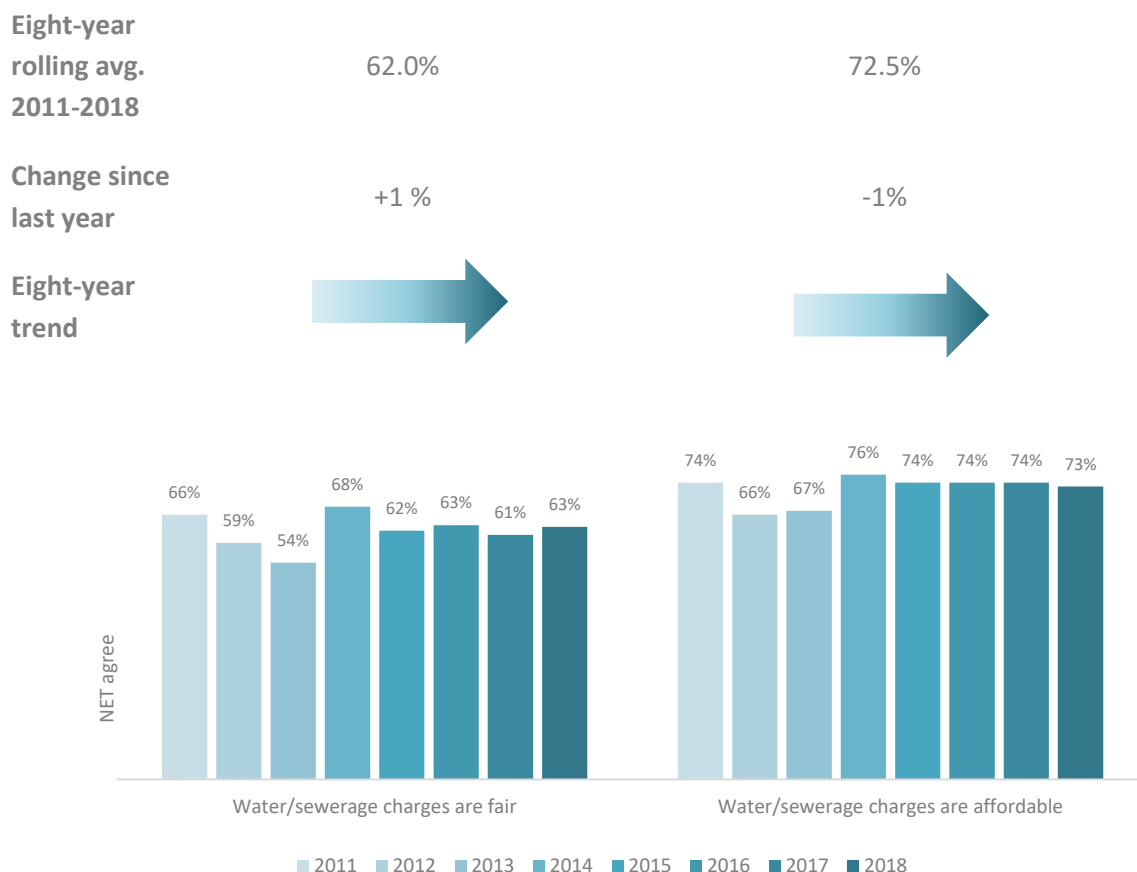


Fairness and affordability of charges

More than half of customers believe the charges they pay for water/sewerage are fair and affordable.

- In 2018, 63 % of customers in England and Wales agree that the charges they pay are fair, a slight though not significant increase since 2017 (61 %). More customers agree that their charges are affordable than fair, 73 % in England and Wales in 2018 (Figure 5).

Figure 5: Fairness and affordability of water/sewerage charges

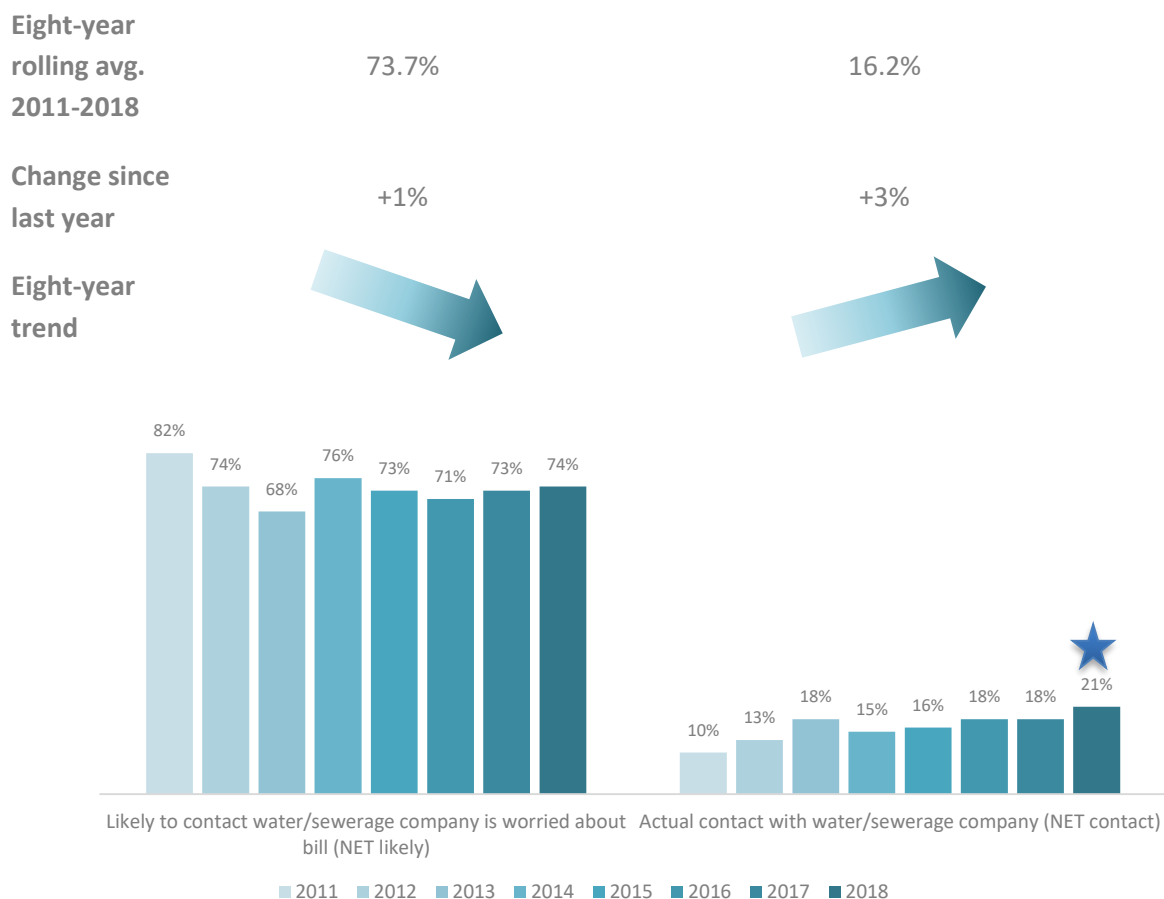


Contact with water companies

Over the last eight years, significantly fewer customers say they are likely to contact their water and/or sewerage company if worried about their bill. However, when customers do make contact, for whatever reason, they are increasingly likely to be satisfied and are significantly more satisfied than 2017.

- Almost three quarters of customers (74 %) in England and Wales would be likely to contact their supplier if they had a problem with their bill (Figure 6). However, over the last eight years, likelihood to contact has fallen significantly, from 82 % in 2011.
- Around one in five customers (21%) in England and Wales made contact with their water/sewerage company in 2018. Contact has significantly increased since 2017 (18 %) and the trend has increased over the last eight years (Figure 6). The main reason for contact is a billing enquiry.
- 81 % of customers in England and Wales are satisfied with contact with their water and / or sewerage company in 2018. Satisfaction with all aspects of contact ranges from 74 % to 84 % (including ease of contact, quality of information, knowledge / professionalism, resolution and kept informed); the eight-year trend is one of improvement for all five aspects of contact handling in England and Wales.

Figure 6: Likelihood to contact vs. actual contact with water/sewerage company



★ Significant difference between 2017-2018 data

Awareness of WaterSure support tariff⁸ and Priority Services

Awareness of WaterSure/WaterSure Wales and Priority Services has increased since 2017 and eight-year trends show increasing awareness.

- Awareness of WaterSure/WaterSure Wales tariffs is 12 % in England and Wales, a significant increase from 9 % in 2017.
- Welsh customers are significantly more likely to be aware of WaterSure than customers in England (16 % vs. 11 % respectively).
- 44 % of customers in England and Wales are aware of Priority Services. This has increased slightly since 2017 (43 %). Although the eight-year trend shows a significant increase in awareness, this is largely due to a change in the wording of this question in 2014.

⁸ WaterSure is a system set up to provide a reduction in charges for customers on a low income and whose water is supplied by a meter.

Figure 7: Awareness of WaterSure and Priority Services

Eight- year
rolling avg.
2011-2018

9.8%

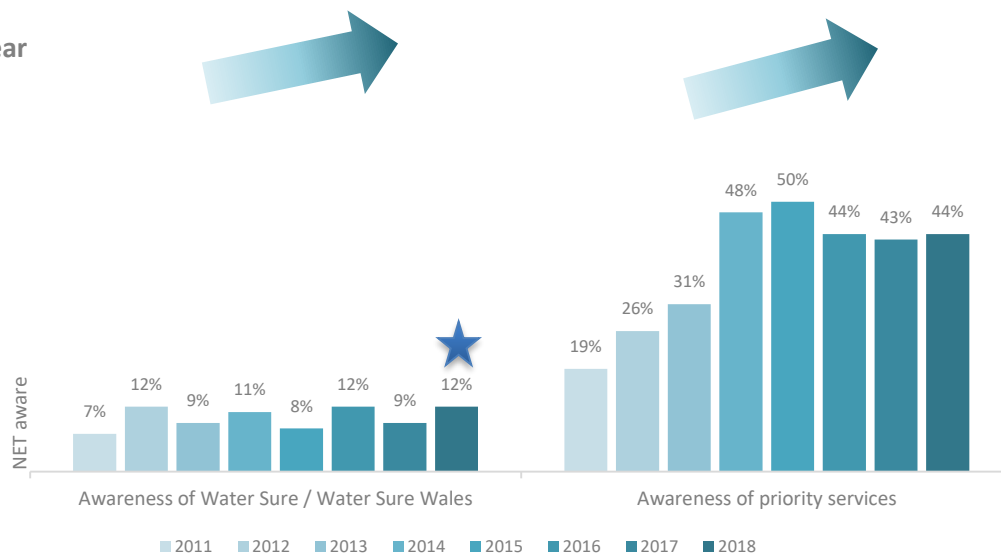
40.8%

Change since
last year

+2%

+1%

Eight-year
trend



★ Significant difference between 2017-2018 data.

Footnote: change of question wording in 2014 in awareness of priority services.

Water meters

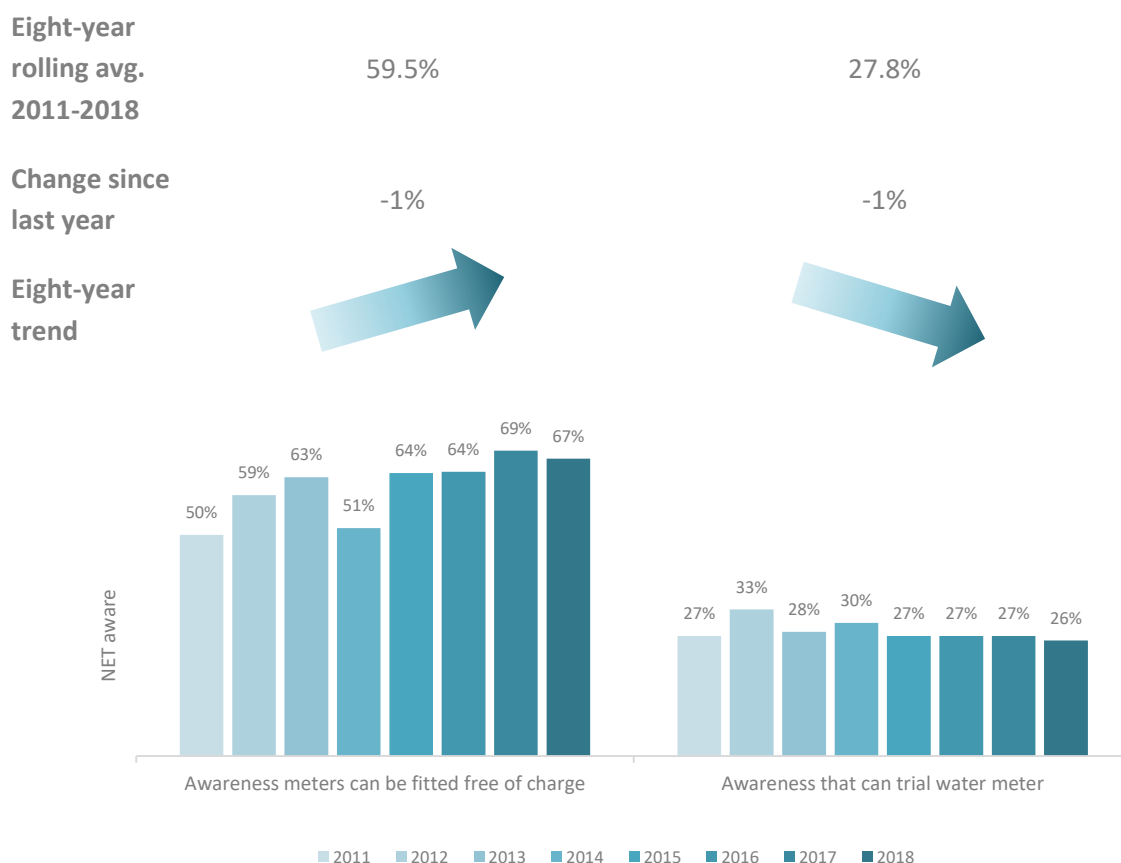
Awareness of the free meter scheme has increased since 2011; however, only a minority of customers are aware that a meter can be fitted on a trial basis⁹

- Two-thirds of unmetered customers in England and Wales are aware of the free meter scheme (67 %). Trends over the last eight years show increasing awareness of the free meter scheme (

⁹ Awareness is measured only in water company areas where the free meter trial scheme has not been discontinued due to universal metering programmes, and only amongst customers from households which do not already have a water meter.

- **Figure 8).**
- However, only 26 % of customers in England and Wales are aware of the 24-month trial period and awareness of the trial period has fallen significantly since 2011.

Figure 8: Awareness meters can be fitted for free and can be trialled



Likelihood to recommend water/sewerage company: Net Promoter Scores (NPS)

Just over two-fifths of customers are very likely to recommend their water/sewerage company in 2018.

- Customers were asked hypothetically how likely they would be to recommend their water/water and sewerage company to friends or family. Just over four in ten (41 %) are very likely to recommend their supplier (scores of 9 or 10).
- The industry NPS¹⁰ is + 17, with customers in Wales significantly more likely to score 9 or 10 and be classed as 'promoters' (a net promoter score of + 43 compared to + 16 in England).
- Scores ranged from - 10 to + 44 across WaSCs and from - 1 to + 37 across WoCs. Only three companies scored a negative NPS (South West, Southern and Affinity Central).

Table 1: NPS by company

| WaSC | NPS Score | WoC | NPS Score |
|----------------|-----------|---------------------|-----------|
| Anglian | 18 | Affinity Central | -1 |
| Dŵr Cymru | 44 | Affinity East | 6 |
| Hafren Dyfrdwy | 25 | Affinity South East | 0 |
| Northumbrian | 38 | Bournemouth | 27 |
| Severn Trent | 20 | Bristol | 24 |
| South West | -10 | Cambridge | 29 |

¹⁰ Those giving scores of 0 to 6 are classified as Detractors, 7 to 8 Passives and 9 to 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

| | | | |
|------------------|----|---------------------|----|
| Southern | -7 | Essex & Suffolk | 25 |
| Thames | 6 | Hartlepool | 37 |
| United Utilities | 16 | Portsmouth | 24 |
| Wessex | 18 | South East | 3 |
| Yorkshire | 38 | South Staffordshire | 13 |
| | | SES | 10 |

Key differences in findings between customers in England and Wales

- The key differences when comparing England and Wales, and significant differences in trends are highlighted in the table below. Generally, scores on most measures are higher in Wales than in England with significant differences being shown in table 2.

Table 2: England and Wales significant differences in 2018

| Key measures | England | | Wales | |
|---|-------------|--------------|-------------|--------------|
| | % /n-number | 8-year trend | % /n-number | 8-year trend |
| Care about services provided | 68% | ↔ | 78% | ↑ |
| Level of trust | 7.67 | ↑ | 8.18 | ↑ |
| Satisfaction with VFM for Water | 71% | ↔ | 82% | ↑ |
| Satisfaction with VFM for Sewerage | 74% | ↔ | 82% | ↔ |
| Agree that charges are fair | 62% | ↔ | 70% | ↑ |
| Likelihood to contact if worried about bill | 74% | ↓ | 69% | ↔ |
| Awareness of Water Sure/Water Sure | 11% | ↑ | 16% | ↑ |
| Wales | | | | |
| Satisfaction with water service | 90% | ↔ | 94% | ↔ |
| Confidence in longer term water supply ¹¹ | 72% | n/a | 87% | n/a |
| Satisfaction with sewerage service | 85% | ↔ | 90% | ↔ |
| Satisfaction with the overall experience with the company ¹² | 85% | n/a | 89% | n/a |

¹¹ This question was first asked in 2016 and a trend has not yet been established.

¹² This question was first asked in 2017 and a trend has not yet been established.

Methodology

Telephone research was conducted with a random sample of households across England and Wales. Respondents were responsible, either solely or jointly, for paying their household's water bill. Quota controls were set according to the 2011 Census.

Fieldwork took place between 1st October 2018 and 9th March 2019. This included a pilot survey of 40 customers to review interview length and routing. A total of 5,158 interviews which were an average of 17 minutes and 16 seconds long.

For inclusivity, customers without landlines (i.e. customers who describe themselves as not having a landline or only using their landline for broadband purposes) continue to be represented in the research, with 1419 interviews achieved in 2018.

At company level, CCWater commissioned 200 interviews for each of the 11 WaSCs, and 150 for the 12 WoCs which equates to 4,000 interviews (4008 were achieved). Each water company was given the opportunity to boost interview numbers and six companies did so:

- Anglian – 200 additional interviews
- Dŵr Cymru – 200 additional interviews
- Northumbrian – 200 additional interviews
- United Utilities – 200 additional interviews
- Yorkshire – 200 additional interviews
- Bristol – 150 additional interviews

The additional interviews have been included in the overall report and incorporate the weighting factors applied to the total sample.

As a result of the large sample size for England and Wales we can be 95% confident that the sample result reflects the actual population result to within the margin of error shown in Table 3.

The questionnaire is similar to those used in previous years, although it omits a few questions asked in previous surveys and includes a small number of new questions. This ensures that the survey addresses emerging issues as well as on-going ones that may be of interest to water customers.

The findings for each WaSC and WoC are reported here on a question by question basis; they are also published on CCW's website¹³ on a company by company basis.

Analysis

Analysis has been undertaken at total sample level (England and Wales combined), by country (England versus Wales) and by water company.

The total data is weighted in line with the number of household water supply connections for each water company. All total charts show weighted data but give the unweighted base sizes. All individual company data is unweighted.

The table below shows the statistical reliability for the total sample size, by country, for each water company and for metered and unmetered households.

¹³ <https://www.ccwater.org.uk/households/company-performance/>

Table 3. Statistical reliability

| | Sample size | 10% or 90% ± | 30% or 70% ± | 50% ± |
|---|-------------|-----------------|-----------------|----------|
| Total | 5158 | 0.82 | 1.25 | 1.36 |
| England | 4556 | 0.87 | 1.33 | 1.45 |
| Wales | 602 | 2.4 | 3.66 | 3.99 |
| Company sample sizes | 400 | 2.94 | 4.49 | 4.9 |
| | 300 | 3.39 | 5.19 | 5.66 |
| | 200 | 4.16 | 6.35 | 6.93 |
| | 150 | 4.8 | 7.33 | 8 |
| Metered households | 2817 | 1.11 | 1.69 | 1.85 |
| Unmetered households | 2238 | 1.24 | 1.9 | 2.07 |
| 150: Bournemouth Water, Cambridge Water, Affinity Water Central, Affinity Water East, Affinity Water South East, Essex and Suffolk Water, Hartlepool Water, Portsmouth Water, South East Water, South Staffordshire Water and SES Water. | | | | |
| 200: Hafren, Severn Trent, South West Water, Southern Water, Thames Water, Wessex Water. | | | | |
| 300: Bristol Water. | | | | |
| 400: Anglian, Dŵr Cymru, Northumbrian, United Utilities, Yorkshire Water. | | | | |

Significant differences between England and Wales, and 2017 vs. 2018 data are highlighted on national charts with a star.

The sample was structured according to the Office of National Statistics (ONS) Census Data, 2011. Quotas were set for each water company, based on gender, age and socio-economic classification (SEC) within each census region that the water company was situated.

In 2014, DJS Research commissioned a face to face omnibus survey of 1,000 water bill-payers with a representative sample for England and Wales in order to identify the proportion of younger bill payers in England and Wales. The survey discovered that only 27% of 18-29-year olds were responsible for paying their water bill. As a result, the age band quotas used for Water Matters were adjusted accordingly and continue to be so.

The SEC classifications used are:

1. Higher managerial, administrative and professional occupations; lower managerial, administrative and professional occupations.
2. Intermediate occupations; small employers and own account workers.
3. Lower supervisory and technical occupations; semi-routine occupations; routine occupations.
4. Never worked and long-term unemployed.
5. Full-time students.

Water Matters has been a company level survey for eight years, and to get full value from this data, trend analysis has been conducted across eight years. Where 'don't know' responses are excluded from reported percentages, the rolling eight-year averages are calculated using the total valid base (which excludes don't know responses or respondents who refused to answer) of weighted data at each time point to properly account for the changes in proportions of respondents answering each question. Where questions are reported with 'don't know' responses (e.g. awareness questions) the

rolling eight-year averages are based on the total sample size for the industry, nation or company as appropriate.

For consistency in approach to trend analysis between 2016 and 2017, the eight-year trends are analysed using the Mann-Kendall method (Mann 1945¹⁴, Kendall 1975¹⁵). This statistical technique identifies significant upward or downward trends in the reported proportions for each of the key measures. The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data. The raw data is transformed using the arcsine square root transformation to prevent forecasts from passing the lower (0%) or upper (100%) bounds. The smoothing process then produces a weighted average of the year in question and all years preceding (using a conservative smoothing parameter, $\alpha=0.5$) to smooth any spikes or troughs in the reported proportions. The smoothed data determines whether a longer-term increasing or decreasing trend exists (indicated by trend arrows on the charts) which is determined by using a Mann-Kendall test (Gilbert 1987¹⁶). Eight-year trend analyses are only conducted when data exists for all of the previous eight years and when the question format, routing and text has remained the same over this entire period.

Cluster analysis

Cluster analysis was carried out for the first time in 2013 and has been repeated every year since then. Cluster analysis uses statistical techniques to segment customers into different groups depending on how they respond to the following questions:

- Value for money for both water and sewerage services.
- Overall satisfaction with water services and sewerage services.
- Affordability.
- Fairness.

The proportions for this year are as follows:

- Cluster 1 – **“Very Satisfied”** – 56 % (54 % 2017). This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster by far.
- Cluster 2 – **“Neutral”** – 22 % (22 % 2017). These customers feel neutral to satisfied with value for money, services, affordability and fairness. The second largest cluster and similar to 2017.
- Cluster 3 – **“Unfair”** – 13 % (17 % 2017). Neutral or satisfied on all value for money, services and affordability, but feel their charges are unfair.
- Cluster 4 – **“Dissatisfied”** – 9 % (7 % 2017). This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied.

¹⁴Mann, H.B. 1945. Non-parametric tests against trend, *Econometrica* 13:163-171.

¹⁵Kendall, M.G. 1975. *Rank Correlation Methods*, 4th edition, Charles Griffin, London.

¹⁶Gilbert, Richard O. *Statistical Methods for Environmental Pollution Monitoring*. United States: N. p., 1987

The main characteristics of each cluster are:

- The **‘Very satisfied’** are the most likely cluster to be female (56 % vs 53 % of total) aged 75+ (17 % vs. 15 % of total) and be retired (54 % vs. 51 % of total). They are the most likely cluster to live in households without children (76 % vs 73 % of total).
- The **‘Neutrals’** are mainly female (55 %) and aged 45-59 (35 %). They are equally likely to be working as they are retired (49 % for both). They mainly live in households without children (68 %). Neutrals are slightly more likely to be in routine and manual occupations or be unemployed/students (34 % vs. 32 % of total).
- The **‘Unfair’** cluster are the most likely cluster to be male (60% vs. 47% of total) and be aged 45-59 years old (42 % vs. 36 % of the total). They are the most likely cluster to be in higher managerial occupations (52 % vs. 44% of total) and earn over £50,000 / year. They are the least likely cluster to receive benefits or tax credits (14 % vs. 20 % of total) and are the least likely segment to be retired.
- Those in the **‘Dissatisfied’** cluster are the most likely cluster to be unemployed/students (16 % vs. 10 % of total) and have a disability / long-term illness (23 % vs. 16 % of total) or live with someone who does (15 % vs. 9 % of total). They are mainly aged 45-74 years (66 %) and are the least likely segment to be white British (78 % vs. 86 % total). They are also the most likely cluster to live in households with children (30 % vs 25 % of total) and receive benefits or tax credits (32 % vs. 20 % of total). They are the most likely segment to earn less than £20,000 / year.

Changes in 2018

Dee Valley and Hafren Dyfrdwy

Historically Dee Valley Water supplied water services to parts of North East Wales and parts of North West England. In February 2017, Dee Valley was taken over by Severn Trent Water. On 1 July 2018, Dee Valley Water ceased to operate. The area supplied by Dee Valley in Wales was transferred to a new company named Hafren Dyfrdwy. The small area supplied by Dee Valley in England was taken over by Severn Trent.

For the purposes of this report, Dee Valley data remains within the total, WoC, and Welsh data for 2011-2017. Data for this year (2018) includes Hafren Dyfrdwy at the total, WaSC and Welsh level. Given the change in supply areas data for Hafren Dyfrdwy has not been added to or compared against data for Dee Valley Water.

In each of the tables, the rolling average for Hafren has been added at the request of CCWater. Please note, this data is based on 2018 data only.

Interpreting the eight-year trend tables in the chapters which follow

Due to rounding, summed percentages may be $\pm 1\%$ different from summing individual proportions.

All data excludes don't knows, with the exception of questions relating to awareness and open response questions which are reported with don't know responses included.

Weighting has been applied to figures referring to the Total (England and Wales combined), England and Wales by nation and the WoC and WaSC averages. For consistency with previous reports, all figures reported by individual water company are unweighted.

The base sample sizes reported in the WaSC and WoC analysis tables include don't knows consistent with the layout of previous Water Matters reports. The actual base sizes for each question will vary slightly from these as they exclude don't know responses; in nearly all cases the numbers of don't knows excluded is so small that there is no difference from the margin of error for the full sample size. Open response questions display coded responses where they are greater than 5% only and are based on all responses.

Significant differences at the 95% confidence interval are shown in the charts with coloured arrows/text:

↑ in green indicates a significant upward eight- year trend, or where the eight-year average for a specific company is significantly higher than the eight-year average for aggregate WaSCs or WoCs, or where there has been a significant increase since 2017.

↓ in red indicates a significant downward eight- year trend, or where the eight-year average for a company is significantly lower than the aggregate for all WaSCs or WoCs, or where there has been a significant fall since 2017.

↔ in black indicates a flat trend where there is no significant change over eight years, or no difference in the eight-year company average to the aggregate average for all WaSCs or WoCs, or no significant difference between 2017 and 2018 findings.

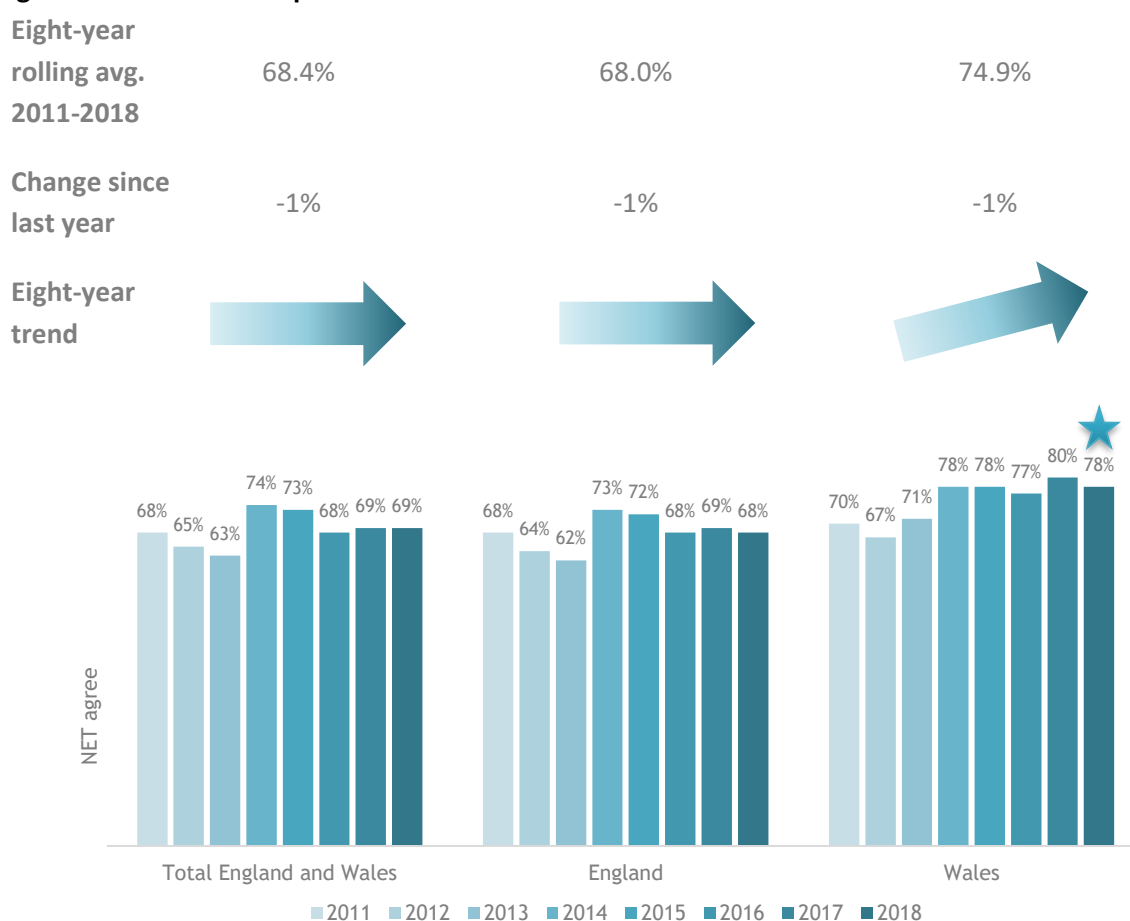
Chapter 1: Care and trust

This part of the data report covers customer perceptions of how much water companies care about the services they provide, the level of trust they have in their water company and their likelihood to recommend their water and/or sewerage company to friends and family.

1.1 Care of service provision

Customers are asked to what extent they agree or disagree that their water company cares about the service it provides to its customers. Eight-year trends for England and Wales, for England and for Wales are shown in Figure 9, with trends for WaSCs and for WoCs in Table 4 and Table 5 which follow.

Figure 9: Care of service provision



★ Significant difference between England and Wales 2018

Table 4: Care of service provision – WaSCs

| Water companies care about service provided to customers | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 68.4% | 68% | 65% | 63% | 74% | 73% | 68% | 69% | 69% | ↔ | n/a | -1% |
| Total WaSCs (2018 base sample: 3202) | 68.8% | 68% | 65% | 63% | 74% | 73% | 70% | 69% | 69% | ↔ | 69% | 0% |
| Anglian Water (2018 base sample: 400) | 69.2% | 66% | 67% | 59% | 75% | 77% | 68% | 73% | 69% | ↔ | ↔ | -4% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 74.8% | 70% | 67% | 71% | 78% | 78% | 76% | 79% | 79% | ↑ | ↑ | 0% |
| Hafren Dyfrdwy (2018 base sample: 201) | 71.7% ¹⁷ | | | | | | | | 72% | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 75.0% | 75% | 70% | 72% | 78% | 77% | 79% | 73% | 75% | ↔ | ↔ | 1% |
| Severn Trent Water (2018 base sample: 200) | 69.9% | 71% | 61% | 65% | 75% | 72% | 74% | 69% | 72% | ↔ | ↔ | 3% |
| South West Water (2018 base sample: 200) | 62.7% | 62% | 57% | 61% | 67% | 66% | 66% | 62% | 62% | ↔ | ↓ | 0% |
| Southern Water (2018 base sample: 200) | 63.7% | 58% | 69% | 58% | 68% | 68% | 67% | 61% | 62% | ↔ | ↓ | 1% |

¹⁷ Hafren rolling average is based on 2018 data only. This is true for all tables.

| | | | | | |
|---|-------|---|---|---|-----|
| Thames Water (2018 base sample: 200) | 62.9% | <p>68% 66% 55% 66% 67% 61% 61% 60%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↓ | -1% |
| United Utilities (2018 base sample: 400) | 69.7% | <p>67% 64% 65% 78% 75% 69% 69% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 1% |
| Wessex Water (2018 base sample: 200) | 73.6% | <p>72% 78% 66% 78% 77% 74% 74% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -4% |
| Yorkshire Water (2018 base sample: 400) | 71.7% | <p>68% 63% 66% 80% 75% 72% 74% 76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | 2% |

Table 5: Care of service provision – WoCs

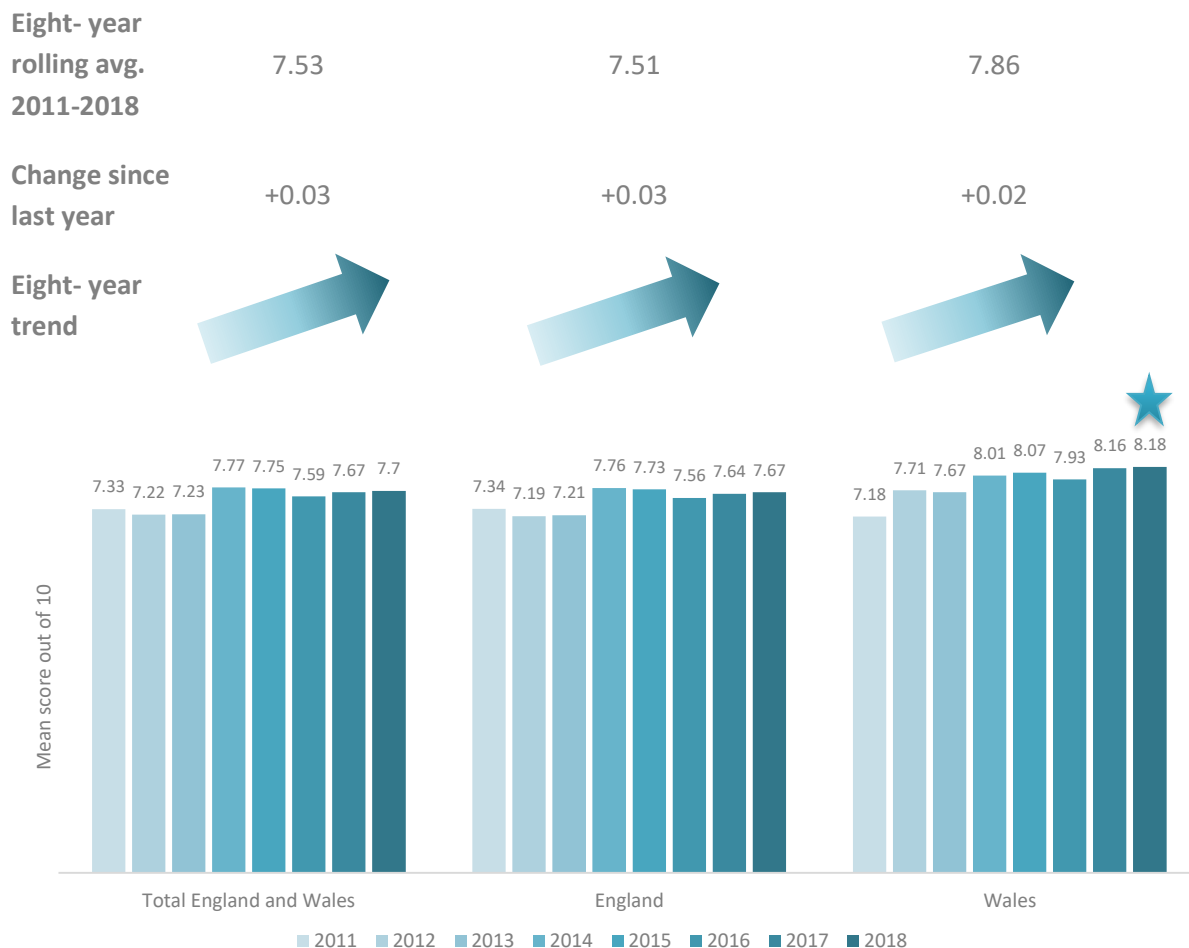
| Water companies care about service provided to customers | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year | | | | | | | | | | | | | | | | | | |
|--|------------------------------------|--|------|------|------|------|------|------|-----|------------------|--------------------------------|------------------------|------|------|------|------|------|------|-----------------|-----|-----|-----|-----|-----|-----|-----|-----|---|-----|-----|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | | | | | | | | | | | | | | | | | | | |
| Industry (2018 base sample: 5158) | 68.4% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Care of service</td><td>68%</td><td>65%</td><td>63%</td><td>74%</td><td>73%</td><td>68%</td><td>69%</td><td>69%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Care of service | 68% | 65% | 63% | 74% | 73% | 68% | 69% | 69% | ↔ | n/a | -1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Care of service | 68% | 65% | 63% | 74% | 73% | 68% | 69% | 69% | | | | | | | | | | | | | | | | | | | | | | |
| Total WoCs (2018 base sample: 1956) | 67.0% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Care of service</td><td>67%</td><td>62%</td><td>61%</td><td>72%</td><td>71%</td><td>65%</td><td>71%</td><td>66%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Care of service | 67% | 62% | 61% | 72% | 71% | 65% | 71% | 66% | ↔ | 66% | -6% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Care of service | 67% | 62% | 61% | 72% | 71% | 65% | 71% | 66% | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water Central (2018 base sample: 150) | 60.9% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Care of service</td><td>65%</td><td>54%</td><td>49%</td><td>68%</td><td>66%</td><td>60%</td><td>66%</td><td>61%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Care of service | 65% | 54% | 49% | 68% | 66% | 60% | 66% | 61% | ↔ | ↔ | -5% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Care of service | 65% | 54% | 49% | 68% | 66% | 60% | 66% | 61% | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water East (2018 base sample: 151) | 66.1% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Care of service</td><td>75%</td><td>59%</td><td>64%</td><td>71%</td><td>68%</td><td>62%</td><td>67%</td><td>63%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Care of service | 75% | 59% | 64% | 71% | 68% | 62% | 67% | 63% | ↓ | ↔ | -4% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Care of service | 75% | 59% | 64% | 71% | 68% | 62% | 67% | 63% | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water Southeast (2018 base sample: 150) | 64.5% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Care of service</td><td>66%</td><td>65%</td><td>53%</td><td>72%</td><td>66%</td><td>64%</td><td>68%</td><td>61%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Care of service | 66% | 65% | 53% | 72% | 66% | 64% | 68% | 61% | ↔ | ↔ | -7% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Care of service | 66% | 65% | 53% | 72% | 66% | 64% | 68% | 61% | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|--|-------|---|---|---|------|
| Bournemouth Water (2018 base sample: 150) | 73.4% | <p>68% 67% 66% 86% 74% 74% 80% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -9% |
| Bristol Water (2018 base sample: 300) | 74.5% | <p>74% 77% 72% 77% 77% 65% 81% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | -8% |
| Cambridge Water (2018 base sample: 150) | 74.2% | <p>77% 70% 74% 85% 77% 72% 65% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 10% |
| Essex & Suffolk Water (2018 base sample: 152) | 67.3% | <p>67% 66% 68% 67% 66% 68% 67% 69%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 1% |
| Hartlepool Water (2018 base sample: 150) | 80.4% | <p>82% 76% 78% 86% 84% 76% 78% 83%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 6% |
| Portsmouth Water (2018 base sample: 150) | 71.5% | <p>71% 59% 71% 82% 73% 74% 68% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 6% |
| South East Water (2018 base sample: 150) | 64.0% | <p>64% 62% 57% 69% 70% 59% 72% 60%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -11% |
| South Staffs Water (2018 base sample: 153) | 70.0% | <p>66% 64% 67% 72% 81% 62% 80% 68%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -12% |
| SES Water (2018 base sample: 150) | 66.6% | <p>65% 62% 63% 77% 72% 68% 66% 61%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -5% |

1.2 Trust in water/sewerage companies

Customers were asked to what extent they trust their water company on a scale of 1 – 10 with 1 being 'do not trust them at all' and 10 being 'trust them completely'. National level trends are shown in Figure 10 with trends for WaSCs and for WoCs in Table 6 and Table 7 which follow. The reasons why customers give low trust scores (1 to 4) are shown in Figure 11 and the reasons why customers give high scores (9 or 10) are shown in Figure 12.








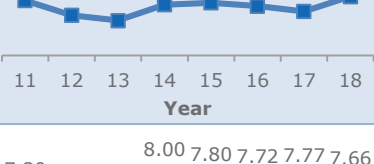

Figure 10: Trust in water/sewerage companies



★ Significant difference between England and Wales 2018

Table 6: Trust in water/sewerage companies – WaSCs

| Level of trust in water companies | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|-----------------------------------|------------------------------------|--------------------------|------|------|------|------|------|------|------|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 7.53 | 7.33 | 7.22 | 7.23 | 7.77 | 7.75 | 7.59 | 7.67 | 7.70 | ↑ | n/a | 0.03 |

| | | | | | |
|--|------|---|-----|------|-------|
| Total WaSCs (2018 base sample: 3202) | 7.54 |  | ↑ | 7.72 | 0.06 |
| Anglian Water (2018 base sample: 400) | 7.60 |  | ↑ | ↔ | -0.21 |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 7.86 |  | ↑ | ↑ | 0.05 |
| Hafren Dyfrdwy (2018 base sample: 201) | 7.97 |  | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 7.85 |  | ↑ | ↔ | -0.05 |
| Severn Trent Water (2018 base sample: 200) | 7.60 |  | ↑ | ↔ | 0.19 |
| South West Water (2018 base sample: 200) | 7.10 |  | ↑ | ↓ | -0.09 |
| Southern Water (2018 base sample: 200) | 7.18 |  | ↔ | ↓ | -0.18 |
| Thames Water (2018 base sample: 200) | 7.28 |  | ↔ | ↔ | 0.40 |
| United Utilities (2018 base sample: 400) | 7.53 |  | ↑ | ↔ | -0.11 |



| | | | | | |
|---|------|---|---|---|------|
| Wessex Water (2018 base sample: 200) | 7.78 |  | ↑ | ↔ | 0.22 |
| Yorkshire Water (2018 base sample: 400) | 7.71 |  | ↑ | ↔ | 0.06 |

Table 7: Trust in water companies – WoCs

| Level of trust in water companies | Eight- year rolling company average | Eight-year company trend | | | | | | | | Eight- year trend | Company average vs WoC average | Change since last year |
|---|---|--------------------------|------|------|------|------|------|------|------|-------------------------|---|------------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 7.53 | 7.33 | 7.22 | 7.23 | 7.77 | 7.75 | 7.59 | 7.67 | 7.70 | ↑ | n/a | 0.03 |
| Total WoCs (2018 base sample: 1956) | 7.51 | 7.32 | 7.14 | 7.28 | 7.78 | 7.83 | 7.46 | 7.69 | 7.61 | ↑ | 7.61 | -0.09 |
| Affinity Water Central (2018 base sample: 150) | 7.34 | 7.02 | 6.90 | 7.11 | 7.74 | 7.68 | 7.46 | 7.39 | 7.41 | ↔ | ↔ | 0.02 |
| Affinity Water East (2018 base sample: 151) | 7.51 | 7.56 | 7.13 | 7.38 | 7.85 | 7.22 | 7.54 | 7.83 | 7.59 | ↔ | ↔ | -0.25 |
| Affinity Water Southeast (2018 base sample: 150) | 7.32 | 7.11 | 7.36 | 6.83 | 7.46 | 7.54 | 7.34 | 7.31 | 7.59 | ↑ | ↔ | 0.28 |
| Bournemouth Water (2018 base sample: 150) | 7.78 | 7.46 | 7.44 | 7.47 | 8.03 | 7.90 | 7.95 | 8.01 | 8.01 | ↑ | ↑ | 0.01 |
| Bristol Water (2018 base sample: 300) | 7.67 | 7.31 | 7.37 | 7.66 | 7.73 | 7.81 | 7.32 | 8.05 | 8.12 | ↑ | ↑ | 0.07 |




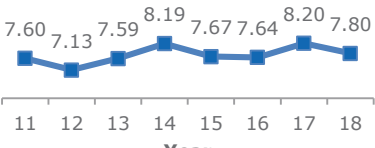
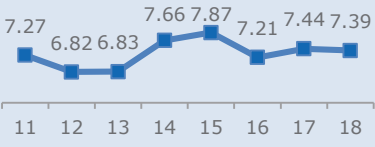
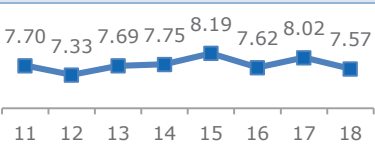
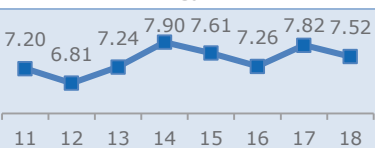
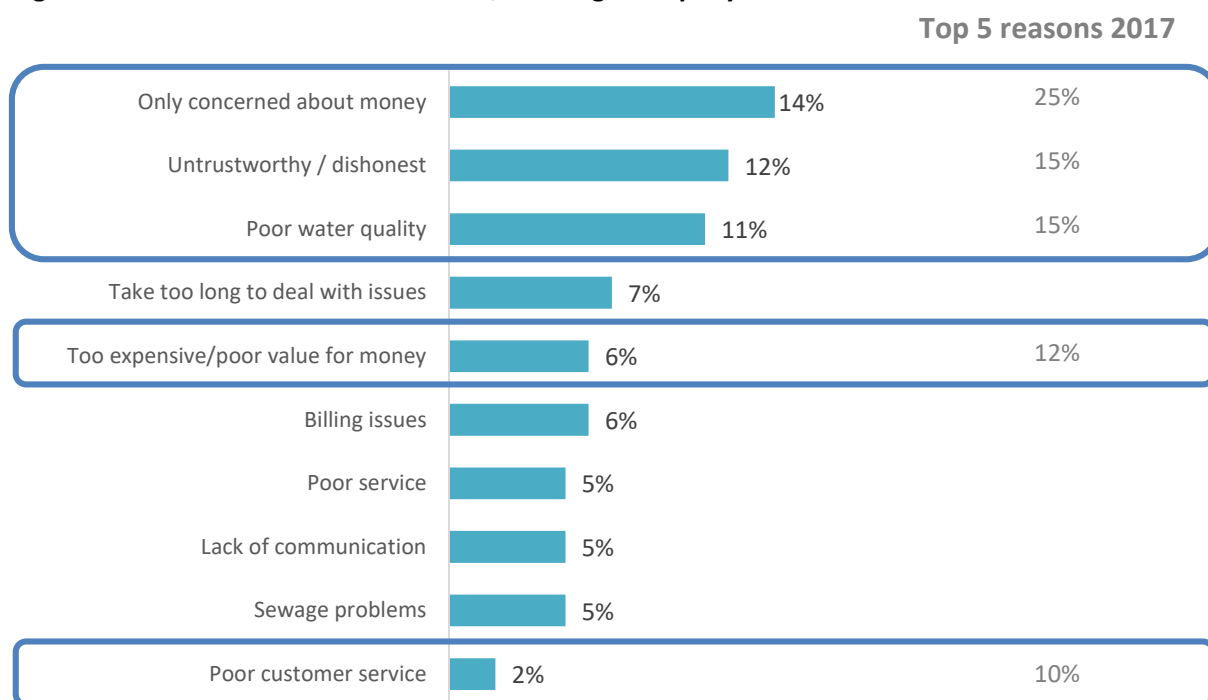
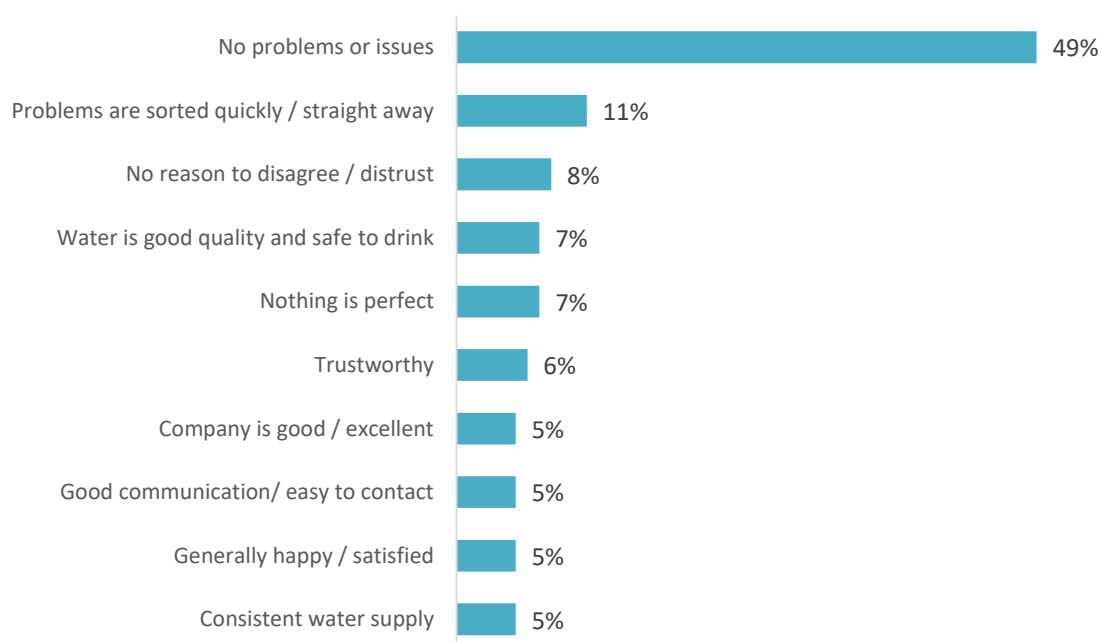
| | | | | | |
|--|------|---|---|---|-------|
| Cambridge Water (2018 base sample: 150) | 7.79 |  <p>Year</p> | ↑ | ↑ | 0.22 |
| Essex & Suffolk Water (2018 base sample: 152) | 7.54 |  <p>Year</p> | ↑ | ↔ | 0.04 |
| Hartlepool Water (2018 base sample: 150) | 8.15 |  <p>Year</p> | ↔ | ↑ | 0.04 |
| Portsmouth Water (2018 base sample: 150) | 7.72 |  <p>Year</p> | ↑ | ↔ | -0.40 |
| South East Water (2018 base sample: 150) | 7.31 |  <p>Year</p> | ↔ | ↔ | -0.05 |
| South Staffs Water (2018 base sample: 153) | 7.74 |  <p>Year</p> | ↔ | ↔ | -0.45 |
| SES Water (2018 base sample: 150) | 7.42 |  <p>Year</p> | ↑ | ↔ | -0.29 |

Figure 11: Reasons for distrust of water/sewerage company



Footnote: Reasons for distrust which are below 5% are not shown unless were in 'Top 5' in last year's data. Base size (unweighted) for 2018, n=241)

Figure 12: Reasons for trusting water/sewerage company (new question in 2018)



Footnote: Reasons for trust which are below 5% are not shown

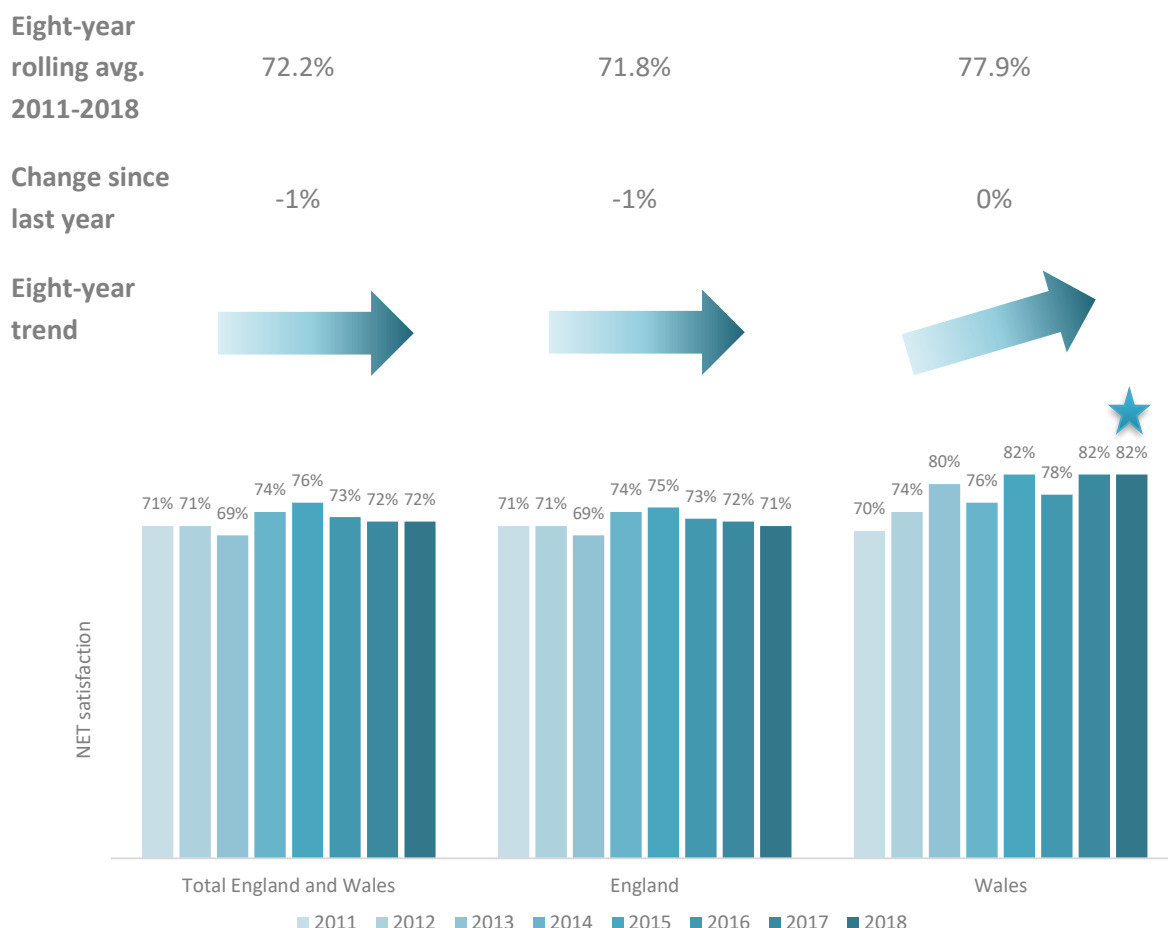
Chapter 2: Value for money, fairness and affordability

This chapter presents views on the charges paid for water and sewerage services. Topics include fairness, affordability and value for money.

2.1 Value for money of water services

Customers were asked how far they agreed that the water services they receive are value for money. National views are shown in Figure 13 below, followed by Table 8 and Table 9 which present customers' views for each WaSC and for each WoC respectively.

Figure 13: Satisfaction with value for money of water services



★ Significant difference between England and Wales 2018

Table 8: Satisfaction with value for money of water services – WaSCs

| Satisfaction with value for money of water services | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|---|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 72.2% | 71% | 71% | 69% | 74% | 76% | 73% | 72% | 72% | ↔ | n/a | -1% |

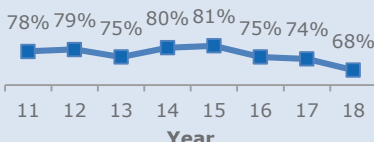
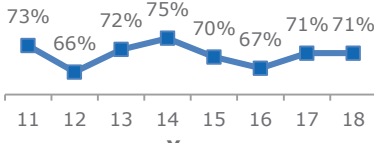
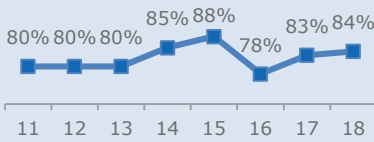
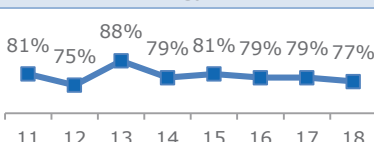

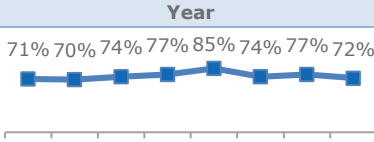
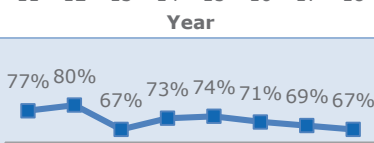
Year: 11 12 13 14 15 16 17 18

| | | | | | |
|--|-------|---|-----|-----|-----|
| Total WaSCs (2018 base sample: 3202) | 72.1% | <p>70% 71% 69% 74% 75% 74% 72% 72%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | 72% | 0% |
| Anglian Water (2018 base sample: 400) | 73.2% | <p>71% 69% 71% 74% 77% 73% 79% 72%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -6% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 77.9% | <p>69% 74% 81% 75% 82% 78% 82% 82%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | 0% |
| Hafren Dyfrdwy (2018 base sample: 201) | 76.4% | <p>76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 78.2% | <p>83% 74% 78% 77% 77% 84% 78% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -3% |
| Severn Trent Water (2018 base sample: 200) | 74.1% | <p>69% 71% 72% 77% 75% 78% 72% 78%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | 5% |
| South West Water (2018 base sample: 200) | 53.6% | <p>35% 53% 51% 56% 58% 65% 54% 56%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↓ | 2% |
| Southern Water (2018 base sample: 200) | 66.8% | <p>67% 68% 68% 70% 66% 72% 61% 62%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↓ | 0% |
| Thames Water (2018 base sample: 200) | 69.8% | <p>72% 79% 63% 70% 74% 70% 66% 65%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↓ | -1% |
| United Utilities (2018 base sample: 400) | 69.9% | <p>68% 66% 64% 75% 73% 68% 73% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -2% |

| | | | | | |
|---|-------|---|---|---|-----|
| Wessex Water (2018 base sample: 200) | 73.8% | <p>64% 73% 74% 78% 76% 75% 76% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -1% |
| Yorkshire Water (2018 base sample: 400) | 77.2% | <p>80% 71% 73% 78% 82% 79% 76% 77%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 1% |

Table 9: Satisfaction with value for money of water services – WoCs

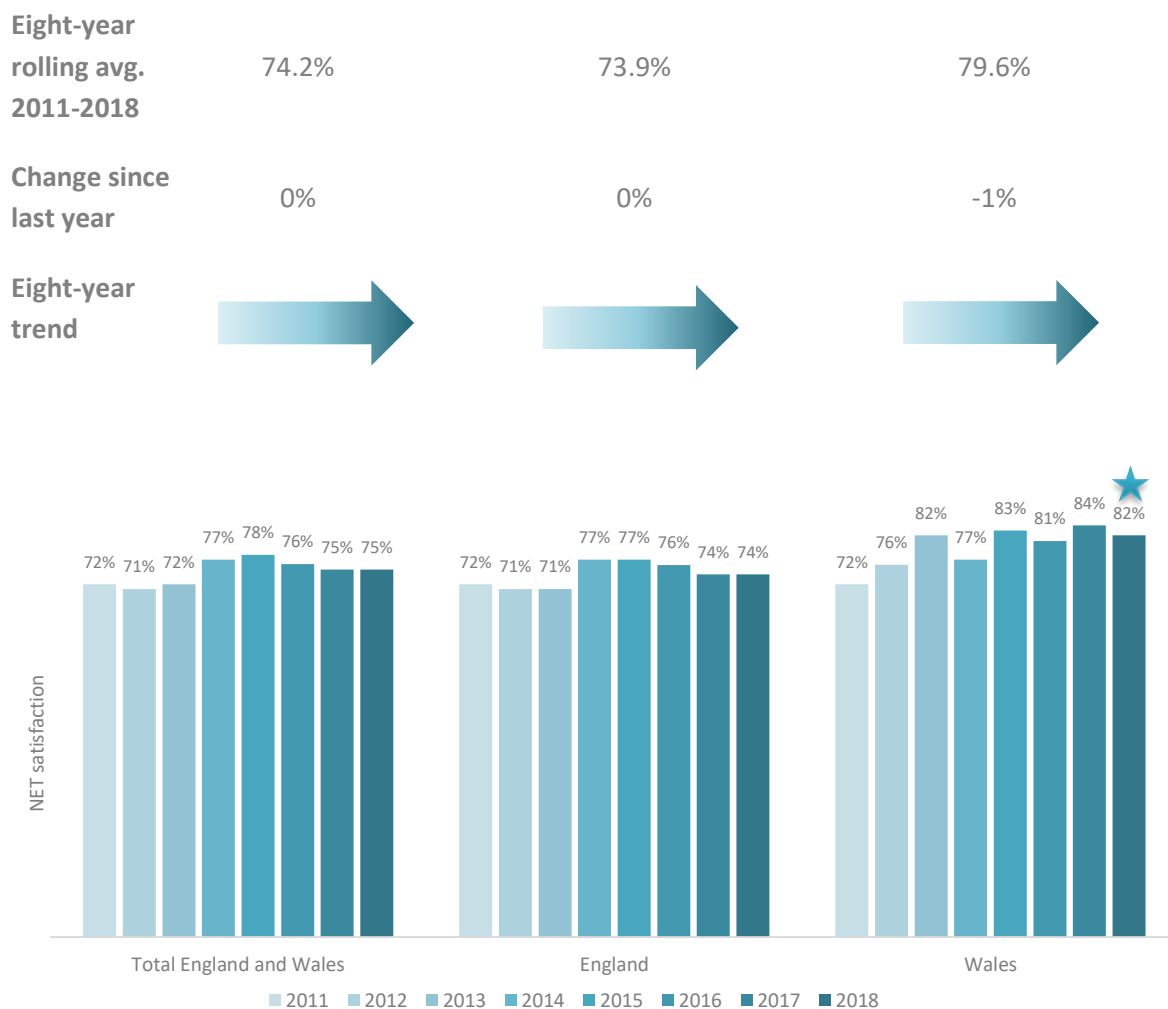
| Satisfaction with value for money of water services | Eight- year rolling company average | Eight-year company trend | | | | | | | | Eight- year trend | Company average vs WoC average | Change since last year |
|---|---|--------------------------|-----|-----|-----|-----|-----|-----|-----|-------------------------|---|------------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 72.2% | 71% | 71% | 69% | 74% | 76% | 73% | 72% | 72% | ↔ | n/a | -1% |
| Total WoCs (2018 base sample: 1956) | 72.2% | 73% | 69% | 70% | 75% | 79% | 70% | 72% | 70% | ↔ | 70% | -2% |
| Affinity Water Central (2018 base sample: 150) | 68.7% | 74% | 64% | 62% | 74% | 78% | 69% | 63% | 65% | ↔ | ↔ | 2% |
| Affinity Water East (2018 base sample: 151) | 71.8% | 75% | 71% | 77% | 78% | 71% | 67% | 71% | 64% | ↔ | ↔ | -8% |
| Affinity Water Southeast (2018 base sample: 150) | 69.9% | 74% | 70% | 63% | 72% | 72% | 72% | 66% | 71% | ↔ | ↔ | 5% |
| Bournemouth Water (2018 base sample: 150) | 78.2% | 69% | 71% | 79% | 81% | 78% | 84% | 78% | 85% | ↑ | ↑ | 7% |
| Bristol Water (2018 base sample: 300) | 73.0% | 76% | 71% | 72% | 70% | 82% | 62% | 77% | 75% | ↔ | ↔ | -3% |

| Cambridge Water (2018 base sample: 150) | 76.2% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>78%</td></tr><tr><td>12</td><td>79%</td></tr><tr><td>13</td><td>75%</td></tr><tr><td>14</td><td>80%</td></tr><tr><td>15</td><td>81%</td></tr><tr><td>16</td><td>75%</td></tr><tr><td>17</td><td>74%</td></tr><tr><td>18</td><td>68%</td></tr></table> | Year | Percentage | 11 | 78% | 12 | 79% | 13 | 75% | 14 | 80% | 15 | 81% | 16 | 75% | 17 | 74% | 18 | 68% | ↔ | ↔ | -6% |
|--|------------|--|------|------------|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|---|---|-----|
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 78% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 79% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 75% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 80% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 81% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 75% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 74% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| Essex & Suffolk Water (2018 base sample: 152) | 70.7% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>73%</td></tr><tr><td>12</td><td>66%</td></tr><tr><td>13</td><td>72%</td></tr><tr><td>14</td><td>75%</td></tr><tr><td>15</td><td>70%</td></tr><tr><td>16</td><td>67%</td></tr><tr><td>17</td><td>71%</td></tr><tr><td>18</td><td>71%</td></tr></table> | Year | Percentage | 11 | 73% | 12 | 66% | 13 | 72% | 14 | 75% | 15 | 70% | 16 | 67% | 17 | 71% | 18 | 71% | ↔ | ↔ | 0% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 73% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 72% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 75% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 70% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| Hartlepool Water (2018 base sample: 150) | 82.2% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>80%</td></tr><tr><td>12</td><td>80%</td></tr><tr><td>13</td><td>80%</td></tr><tr><td>14</td><td>85%</td></tr><tr><td>15</td><td>88%</td></tr><tr><td>16</td><td>78%</td></tr><tr><td>17</td><td>83%</td></tr><tr><td>18</td><td>84%</td></tr></table> | Year | Percentage | 11 | 80% | 12 | 80% | 13 | 80% | 14 | 85% | 15 | 88% | 16 | 78% | 17 | 83% | 18 | 84% | ↔ | ↑ | 2% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 80% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 80% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 80% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 78% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 83% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 84% | | | | | | | | | | | | | | | | | | | | | | |
| Portsmouth Water (2018 base sample: 150) | 79.8% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>81%</td></tr><tr><td>12</td><td>75%</td></tr><tr><td>13</td><td>88%</td></tr><tr><td>14</td><td>79%</td></tr><tr><td>15</td><td>81%</td></tr><tr><td>16</td><td>79%</td></tr><tr><td>17</td><td>79%</td></tr><tr><td>18</td><td>77%</td></tr></table> | Year | Percentage | 11 | 81% | 12 | 75% | 13 | 88% | 14 | 79% | 15 | 81% | 16 | 79% | 17 | 79% | 18 | 77% | ↔ | ↔ | -2% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 81% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 75% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 79% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 81% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 79% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 79% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| South East Water (2018 base sample: 150) | 71.1% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>69%</td></tr><tr><td>12</td><td>71%</td></tr><tr><td>13</td><td>64%</td></tr><tr><td>14</td><td>72%</td></tr><tr><td>15</td><td>83%</td></tr><tr><td>16</td><td>67%</td></tr><tr><td>17</td><td>74%</td></tr><tr><td>18</td><td>69%</td></tr></table> | Year | Percentage | 11 | 69% | 12 | 71% | 13 | 64% | 14 | 72% | 15 | 83% | 16 | 67% | 17 | 74% | 18 | 69% | ↔ | ↔ | -5% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 69% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 72% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 83% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 74% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 69% | | | | | | | | | | | | | | | | | | | | | | |
| South Staffs Water (2018 base sample: 153) | 75.0% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>71%</td></tr><tr><td>12</td><td>70%</td></tr><tr><td>13</td><td>74%</td></tr><tr><td>14</td><td>77%</td></tr><tr><td>15</td><td>85%</td></tr><tr><td>16</td><td>74%</td></tr><tr><td>17</td><td>77%</td></tr><tr><td>18</td><td>72%</td></tr></table> | Year | Percentage | 11 | 71% | 12 | 70% | 13 | 74% | 14 | 77% | 15 | 85% | 16 | 74% | 17 | 77% | 18 | 72% | ↑ | ↔ | -5% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 70% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 74% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 74% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 72% | | | | | | | | | | | | | | | | | | | | | | |
| SES Water (2018 base sample: 150) | 72.3% |  <table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>77%</td></tr><tr><td>12</td><td>80%</td></tr><tr><td>13</td><td>67%</td></tr><tr><td>14</td><td>73%</td></tr><tr><td>15</td><td>74%</td></tr><tr><td>16</td><td>71%</td></tr><tr><td>17</td><td>69%</td></tr><tr><td>18</td><td>67%</td></tr></table> | Year | Percentage | 11 | 77% | 12 | 80% | 13 | 67% | 14 | 73% | 15 | 74% | 16 | 71% | 17 | 69% | 18 | 67% | ↓ | ↔ | -2% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 80% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 73% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 74% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 69% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 67% | | | | | | | | | | | | | | | | | | | | | | |

2.2 Value for money of sewerage services

Customers were asked how far they agreed that the sewerage services they receive are value for money. National views are shown in Figure 14 below, followed by Table 10 and Table 11 which present customer views by each WaSC and WoC respectively.

Figure 14: Satisfaction with value for money of sewerage services



★ Significant difference between England and Wales 2018

Table 10: Satisfaction with value for money of sewerage services – WaSCs

| Satisfaction with value for money of sewerage services | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 74.2% | 72% | 71% | 72% | 77% | 78% | 76% | 75% | 75% | ↔ | n/a | 0% |
| | | | | | | | | | | | | |
| | | Year | | | | | | | | | | |

| | | | | | |
|--|-------|---|-----|-----|-----|
| Total WaSCs (2018 base sample: 3202) | 74.7% | <p>72% 72% 72% 77% 78% 77% 75% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | 75% | 0% |
| Anglian Water (2018 base sample: 400) | 74.5% | <p>72% 69% 72% 76% 80% 76% 78% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -4% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 79.8% | <p>72% 77% 83% 76% 83% 81% 84% 83%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | -1% |
| Hafren Dyfrdwy (2018 base sample: 201) | 75.6% | <p>76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 80.1% | <p>84% 77% 80% 80% 79% 84% 78% 78%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | 0% |
| Severn Trent Water (2018 base sample: 200) | 75.9% | <p>68% 73% 74% 79% 79% 80% 75% 79%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 4% |
| South West Water (2018 base sample: 200) | 54.0% | <p>39% 52% 54% 53% 61% 60% 58% 57%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↓ | -1% |
| Southern Water (2018 base sample: 200) | 69.9% | <p>73% 68% 74% 72% 69% 73% 68% 63%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↓ | -6% |
| Thames Water (2018 base sample: 200) | 73.4% | <p>73% 78% 67% 76% 76% 78% 69% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |
| United Utilities (2018 base sample: 400) | 74.1% | <p>71% 67% 68% 78% 80% 72% 77% 80%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 2% |

| | | | | | |
|--|-------|---|---|---|----|
| Wessex Water (2018 base sample: 200) | 76.7% | <p>68% 75% 73% 79% 81% 80% 78% 79%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 0% |
| Yorkshire Water (2018 base sample: 400) | 79.0% | <p>82% 70% 75% 82% 83% 82% 79% 79%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |

Table 11: Satisfaction with value for money of sewerage services – WoCs

| Satisfaction with value for money of sewerage services | Eight- year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight- year trend | Company average vs WoC average | Change since last year |
|--|---|---|-------------------------|---|------------------------------|
| Industry (2018 base sample: 5158) | 74.2% | <p>72% 71% 72% 77% 78% 76% 75% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | n/a | 0% |
| Total WoCs (2018 base sample: 1956) | 72.3% | <p>72% 69% 70% 75% 76% 72% 73% 72%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | 72% | -1% |
| Affinity Water Central (2018 base sample: 150) | 71.6% | <p>72% 70% 71% 75% 74% 75% 66% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 5% |
| Affinity Water East (2018 base sample: 151) | 72.5% | <p>75% 69% 70% 82% 70% 70% 69% 76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 7% |
| Affinity Water Southeast (2018 base sample: 150) | 67.2% | <p>74% 73% 58% 70% 67% 70% 61% 65%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | 4% |
| Bournemouth Water (2018 base sample: 150) | 74.8% | <p>69% 63% 67% 81% 76% 81% 79% 84%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | 5% |
| Bristol Water (2018 base sample: 300) | 74.4% | <p>78% 68% 76% 70% 81% 63% 82% 76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -7% |

| Cambridge Water (2018 base sample: 150) | 73.9% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>76%</td><td>74%</td><td>69%</td><td>77%</td><td>75%</td><td>76%</td><td>76%</td><td>68%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 76% | 74% | 69% | 77% | 75% | 76% | 76% | 68% | ↔ | ↔ | -8% |
|--|-------|---|------|-----|-----|-----|-----|-----|----|----|----|------------|-----|-----|-----|-----|-----|-----|-----|-----|---|---|-----|
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 76% | 74% | 69% | 77% | 75% | 76% | 76% | 68% | | | | | | | | | | | | | | | |
| Essex & Suffolk Water (2018 base sample: 152) | 69.0% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>69%</td><td>61%</td><td>71%</td><td>74%</td><td>70%</td><td>70%</td><td>72%</td><td>66%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 69% | 61% | 71% | 74% | 70% | 70% | 72% | 66% | ↔ | ↔ | -5% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 69% | 61% | 71% | 74% | 70% | 70% | 72% | 66% | | | | | | | | | | | | | | | |
| Hartlepool Water (2018 base sample: 150) | 83.3% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>80%</td><td>83%</td><td>82%</td><td>86%</td><td>86%</td><td>84%</td><td>82%</td><td>82%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 80% | 83% | 82% | 86% | 86% | 84% | 82% | 82% | ↔ | ↑ | 0% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 80% | 83% | 82% | 86% | 86% | 84% | 82% | 82% | | | | | | | | | | | | | | | |
| Portsmouth Water (2018 base sample: 150) | 73.4% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>73%</td><td>69%</td><td>78%</td><td>77%</td><td>73%</td><td>74%</td><td>74%</td><td>69%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 73% | 69% | 78% | 77% | 73% | 74% | 74% | 69% | ↔ | ↔ | -4% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 73% | 69% | 78% | 77% | 73% | 74% | 74% | 69% | | | | | | | | | | | | | | | |
| South East Water (2018 base sample: 150) | 70.9% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>69%</td><td>71%</td><td>63%</td><td>73%</td><td>78%</td><td>65%</td><td>74%</td><td>73%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 69% | 71% | 63% | 73% | 78% | 65% | 74% | 73% | ↔ | ↔ | 0% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 69% | 71% | 63% | 73% | 78% | 65% | 74% | 73% | | | | | | | | | | | | | | | |
| South Staffs Water (2018 base sample: 153) | 76.0% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>71%</td><td>66%</td><td>74%</td><td>80%</td><td>83%</td><td>75%</td><td>82%</td><td>76%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 71% | 66% | 74% | 80% | 83% | 75% | 82% | 76% | ↑ | ↔ | -5% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 71% | 66% | 74% | 80% | 83% | 75% | 82% | 76% | | | | | | | | | | | | | | | |
| SES Water (2018 base sample: 150) | 71.4% | <table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><th>Percentage</th><td>75%</td><td>78%</td><td>67%</td><td>73%</td><td>76%</td><td>73%</td><td>66%</td><td>64%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Percentage | 75% | 78% | 67% | 73% | 76% | 73% | 66% | 64% | ↓ | ↓ | -2% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Percentage | 75% | 78% | 67% | 73% | 76% | 73% | 66% | 64% | | | | | | | | | | | | | | | |

2.3 Fairness of charges

Water bill payers are asked how much they agree or disagree that the water/sewerage charges they pay are fair. Perceptions of fairness for England and Wales, and for each nation are shown in Figure 15. This is followed by views on fairness by each WaSC in Table 12, and by each WoC in Table 13.

Figure 15: Fairness of charges

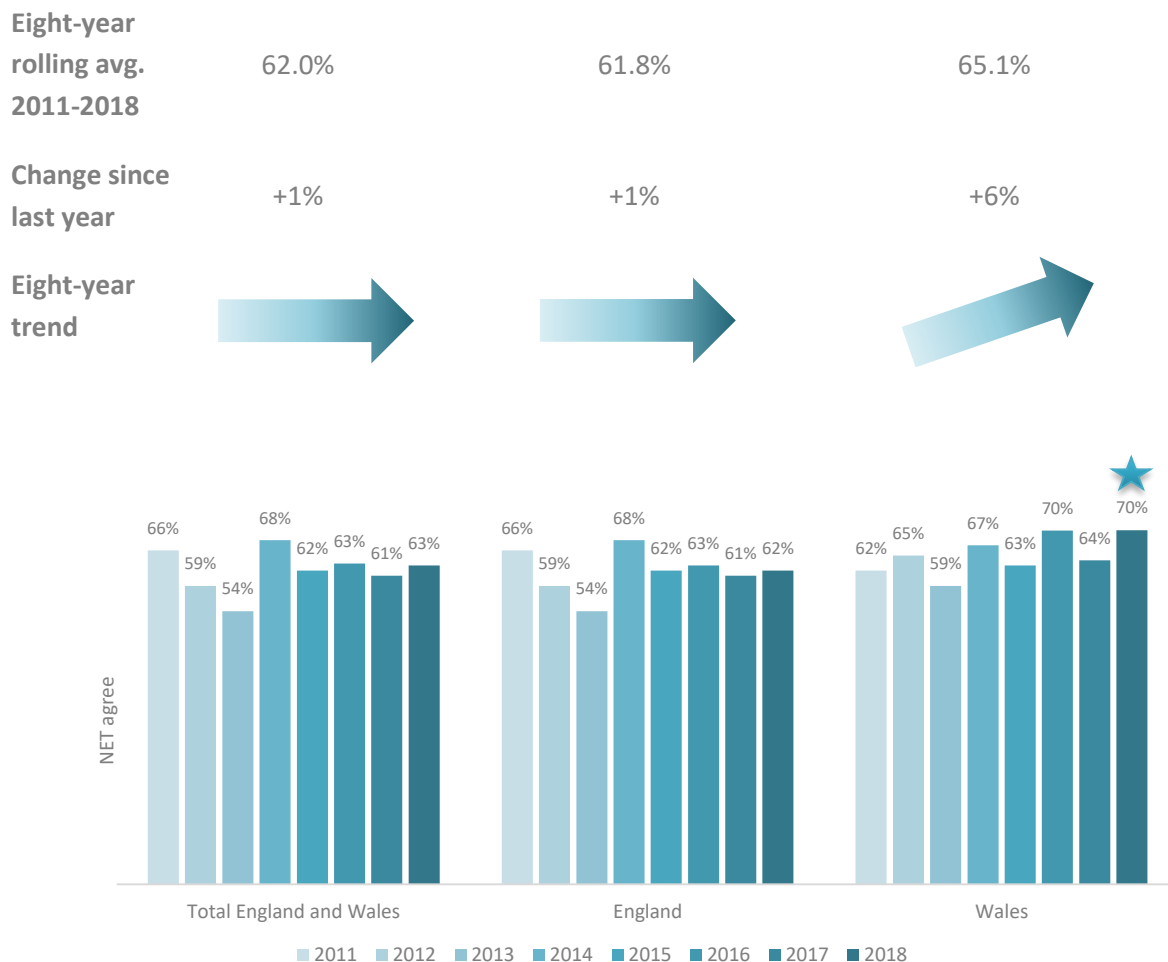


Table 12: Fairness of charges – WaSCs

| Agree charges are fair | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|-----------------------------------|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 62.0% | 66% | 59% | 54% | 68% | 62% | 63% | 61% | 63% | ↔ | n/a | 1% |

Year

| Total WaSCs (2018 base sample: 3202) | 62.2% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>59%</td></tr><tr><td>13</td><td>54%</td></tr><tr><td>14</td><td>68%</td></tr><tr><td>15</td><td>62%</td></tr><tr><td>16</td><td>64%</td></tr><tr><td>17</td><td>61%</td></tr><tr><td>18</td><td>63%</td></tr></table> | Year | Value (%) | 11 | 66% | 12 | 59% | 13 | 54% | 14 | 68% | 15 | 62% | 16 | 64% | 17 | 61% | 18 | 63% | ↔ | 63% | 2% |
|--|-----------|---|------|-----------|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|-----|-----|-----|
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 59% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 54% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 62% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 61% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 63% | | | | | | | | | | | | | | | | | | | | | | |
| Anglian Water (2018 base sample: 400) | 62.5% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>64%</td></tr><tr><td>12</td><td>57%</td></tr><tr><td>13</td><td>54%</td></tr><tr><td>14</td><td>68%</td></tr><tr><td>15</td><td>64%</td></tr><tr><td>16</td><td>64%</td></tr><tr><td>17</td><td>67%</td></tr><tr><td>18</td><td>62%</td></tr></table> | Year | Value (%) | 11 | 64% | 12 | 57% | 13 | 54% | 14 | 68% | 15 | 64% | 16 | 64% | 17 | 67% | 18 | 62% | ↔ | ↔ | -5% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 57% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 54% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 62% | | | | | | | | | | | | | | | | | | | | | | |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 65.0% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>62%</td></tr><tr><td>12</td><td>65%</td></tr><tr><td>13</td><td>59%</td></tr><tr><td>14</td><td>67%</td></tr><tr><td>15</td><td>63%</td></tr><tr><td>16</td><td>70%</td></tr><tr><td>17</td><td>64%</td></tr><tr><td>18</td><td>71%</td></tr></table> | Year | Value (%) | 11 | 62% | 12 | 65% | 13 | 59% | 14 | 67% | 15 | 63% | 16 | 70% | 17 | 64% | 18 | 71% | ↑ | ↑ | 7% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 62% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 65% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 59% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 63% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 70% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 71% | | | | | | | | | | | | | | | | | | | | | | |
| Hafren Dyfrdwy (2018 base sample: 201) | 60.7% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td></td></tr><tr><td>12</td><td></td></tr><tr><td>13</td><td></td></tr><tr><td>14</td><td></td></tr><tr><td>15</td><td></td></tr><tr><td>16</td><td></td></tr><tr><td>17</td><td></td></tr><tr><td>18</td><td>61%</td></tr></table> | Year | Value (%) | 11 | | 12 | | 13 | | 14 | | 15 | | 16 | | 17 | | 18 | 61% | n/a | ↔ | n/a |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 61% | | | | | | | | | | | | | | | | | | | | | | |
| Northumbrian Water (2018 base sample: 400) | 68.2% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>76%</td></tr><tr><td>12</td><td>64%</td></tr><tr><td>13</td><td>63%</td></tr><tr><td>14</td><td>76%</td></tr><tr><td>15</td><td>66%</td></tr><tr><td>16</td><td>73%</td></tr><tr><td>17</td><td>64%</td></tr><tr><td>18</td><td>63%</td></tr></table> | Year | Value (%) | 11 | 76% | 12 | 64% | 13 | 63% | 14 | 76% | 15 | 66% | 16 | 73% | 17 | 64% | 18 | 63% | ↔ | ↔ | -1% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 76% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 63% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 76% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 73% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 63% | | | | | | | | | | | | | | | | | | | | | | |
| Severn Trent Water (2018 base sample: 200) | 63.7% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>58%</td></tr><tr><td>13</td><td>59%</td></tr><tr><td>14</td><td>69%</td></tr><tr><td>15</td><td>64%</td></tr><tr><td>16</td><td>69%</td></tr><tr><td>17</td><td>58%</td></tr><tr><td>18</td><td>68%</td></tr></table> | Year | Value (%) | 11 | 66% | 12 | 58% | 13 | 59% | 14 | 69% | 15 | 64% | 16 | 69% | 17 | 58% | 18 | 68% | ↔ | ↔ | 10% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 58% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 59% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 69% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 64% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 69% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 58% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| South West Water (2018 base sample: 200) | 38.9% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>31%</td></tr><tr><td>12</td><td>43%</td></tr><tr><td>13</td><td>29%</td></tr><tr><td>14</td><td>46%</td></tr><tr><td>15</td><td>39%</td></tr><tr><td>16</td><td>46%</td></tr><tr><td>17</td><td>39%</td></tr><tr><td>18</td><td>38%</td></tr></table> | Year | Value (%) | 11 | 31% | 12 | 43% | 13 | 29% | 14 | 46% | 15 | 39% | 16 | 46% | 17 | 39% | 18 | 38% | ↑ | ↓ | -1% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 31% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 43% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 29% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 46% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 39% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 46% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 39% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 38% | | | | | | | | | | | | | | | | | | | | | | |
| Southern Water (2018 base sample: 200) | 61.6% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>60%</td></tr><tr><td>13</td><td>57%</td></tr><tr><td>14</td><td>68%</td></tr><tr><td>15</td><td>53%</td></tr><tr><td>16</td><td>67%</td></tr><tr><td>17</td><td>62%</td></tr><tr><td>18</td><td>60%</td></tr></table> | Year | Value (%) | 11 | 66% | 12 | 60% | 13 | 57% | 14 | 68% | 15 | 53% | 16 | 67% | 17 | 62% | 18 | 60% | ↔ | ↔ | -2% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 60% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 57% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 53% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 62% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 60% | | | | | | | | | | | | | | | | | | | | | | |
| Thames Water (2018 base sample: 200) | 61.3% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>65%</td></tr><tr><td>13</td><td>53%</td></tr><tr><td>14</td><td>67%</td></tr><tr><td>15</td><td>60%</td></tr><tr><td>16</td><td>58%</td></tr><tr><td>17</td><td>61%</td></tr><tr><td>18</td><td>61%</td></tr></table> | Year | Value (%) | 11 | 66% | 12 | 65% | 13 | 53% | 14 | 67% | 15 | 60% | 16 | 58% | 17 | 61% | 18 | 61% | ↔ | ↔ | 0% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 65% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 53% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 67% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 60% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 58% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 61% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 61% | | | | | | | | | | | | | | | | | | | | | | |
| United Utilities (2018 base sample: 400) | 59.9% | <table><tr><th>Year</th><th>Value (%)</th></tr><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>54%</td></tr><tr><td>13</td><td>48%</td></tr><tr><td>14</td><td>68%</td></tr><tr><td>15</td><td>62%</td></tr><tr><td>16</td><td>59%</td></tr><tr><td>17</td><td>60%</td></tr><tr><td>18</td><td>62%</td></tr></table> | Year | Value (%) | 11 | 66% | 12 | 54% | 13 | 48% | 14 | 68% | 15 | 62% | 16 | 59% | 17 | 60% | 18 | 62% | ↔ | ↔ | 2% |
| Year | Value (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 54% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 48% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 68% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 62% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 59% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 60% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 62% | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|---|-------|--|---|---|-----|
| Wessex Water (2018 base sample: 200) | 64.5% | | ↔ | ↔ | -5% |
| Yorkshire Water (2018 base sample: 400) | 66.9% | | ↔ | ↑ | 4% |

Table 13: Fairness of charges - WoCs

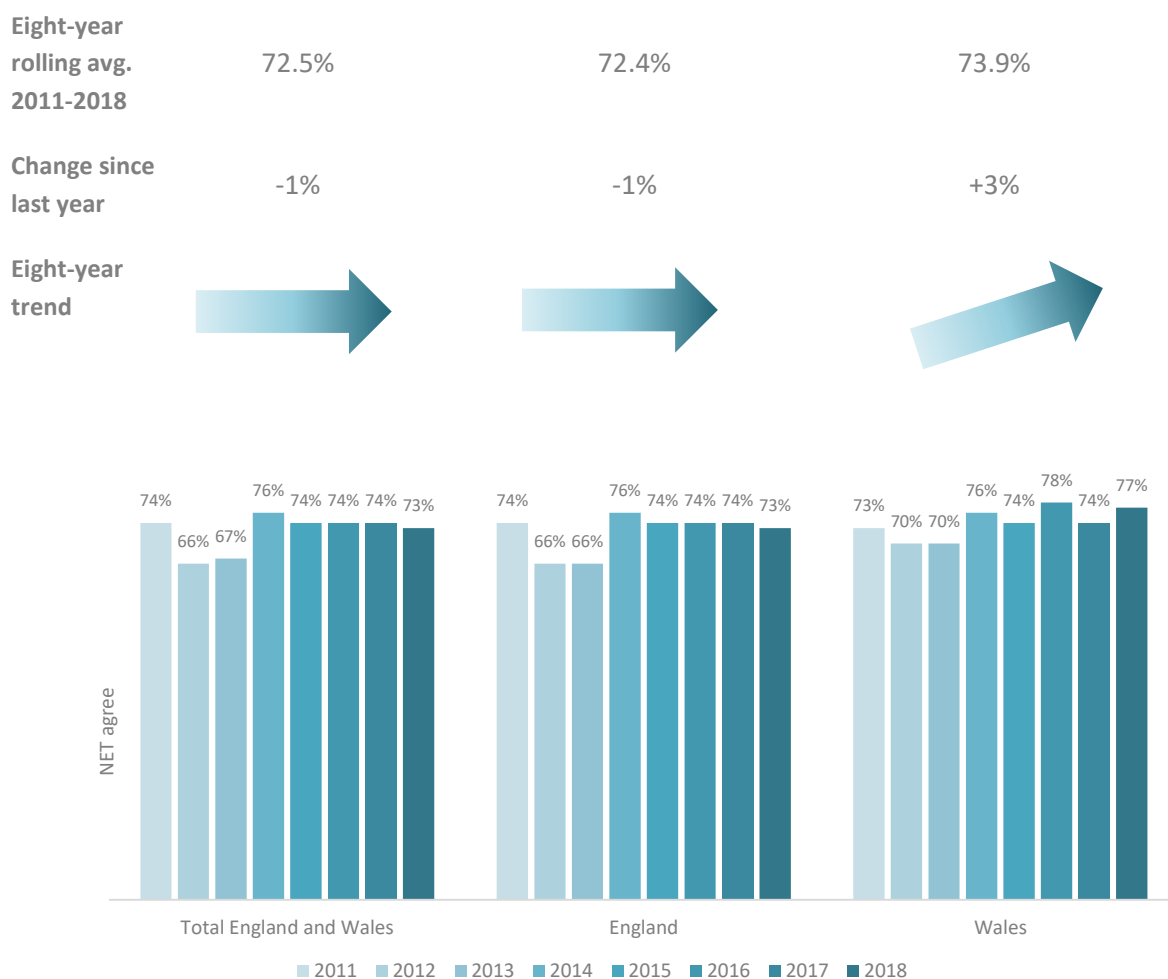
| Agree charges are fair | Eight-year rolling company average | Eight-year company trend | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year | | | | | | | | | | | | | | | | | | |
|--|------------------------------------|---|-----|-----|-----|-----|-----|-----|------------------|--------------------------------|------------------------|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|---|-----|-----|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | | | | | | | | | | | | | | | | | | |
| Industry (2018 base sample: 5158) | 62.0% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>66%</td></tr><tr><td>12</td><td>59%</td></tr><tr><td>13</td><td>54%</td></tr><tr><td>14</td><td>68%</td></tr><tr><td>15</td><td>62%</td></tr><tr><td>16</td><td>63%</td></tr><tr><td>17</td><td>61%</td></tr><tr><td>18</td><td>63%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 66% | 12 | 59% | 13 | 54% | 14 | 68% | 15 | 62% | 16 | 63% | 17 | 61% | 18 | 63% | ↔ | n/a | 1% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 66% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 59% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 54% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 68% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 62% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 63% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 63% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total WoCs (2018 base sample: 1956) | 61.6% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>68%</td></tr><tr><td>12</td><td>60%</td></tr><tr><td>13</td><td>54%</td></tr><tr><td>14</td><td>67%</td></tr><tr><td>15</td><td>62%</td></tr><tr><td>16</td><td>61%</td></tr><tr><td>17</td><td>62%</td></tr><tr><td>18</td><td>60%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 68% | 12 | 60% | 13 | 54% | 14 | 67% | 15 | 62% | 16 | 61% | 17 | 62% | 18 | 60% | ↓ | 60% | -2% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 68% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 60% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 54% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 67% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 62% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 62% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 60% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water Central (2018 base sample: 150) | 57.3% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>62%</td></tr><tr><td>12</td><td>54%</td></tr><tr><td>13</td><td>53%</td></tr><tr><td>14</td><td>62%</td></tr><tr><td>15</td><td>57%</td></tr><tr><td>16</td><td>59%</td></tr><tr><td>17</td><td>58%</td></tr><tr><td>18</td><td>55%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 62% | 12 | 54% | 13 | 53% | 14 | 62% | 15 | 57% | 16 | 59% | 17 | 58% | 18 | 55% | ↔ | ↔ | -3% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 62% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 54% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 53% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 62% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 57% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 59% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 58% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 55% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water East (2018 base sample: 151) | 61.7% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>71%</td></tr><tr><td>12</td><td>59%</td></tr><tr><td>13</td><td>56%</td></tr><tr><td>14</td><td>70%</td></tr><tr><td>15</td><td>61%</td></tr><tr><td>16</td><td>61%</td></tr><tr><td>17</td><td>59%</td></tr><tr><td>18</td><td>57%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 71% | 12 | 59% | 13 | 56% | 14 | 70% | 15 | 61% | 16 | 61% | 17 | 59% | 18 | 57% | ↓ | ↔ | -2% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 71% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 59% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 56% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 70% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 59% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 57% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Affinity Water Southeast (2018 base sample: 150) | 58.7% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>69%</td></tr><tr><td>12</td><td>66%</td></tr><tr><td>13</td><td>47%</td></tr><tr><td>14</td><td>66%</td></tr><tr><td>15</td><td>57%</td></tr><tr><td>16</td><td>63%</td></tr><tr><td>17</td><td>52%</td></tr><tr><td>18</td><td>50%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 69% | 12 | 66% | 13 | 47% | 14 | 66% | 15 | 57% | 16 | 63% | 17 | 52% | 18 | 50% | ↓ | ↓ | -2% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 69% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 66% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 47% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 66% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 57% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 63% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 52% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 50% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bournemouth Water (2018 base sample: 150) | 69.6% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>71%</td></tr><tr><td>12</td><td>63%</td></tr><tr><td>13</td><td>61%</td></tr><tr><td>14</td><td>79%</td></tr><tr><td>15</td><td>61%</td></tr><tr><td>16</td><td>81%</td></tr><tr><td>17</td><td>71%</td></tr><tr><td>18</td><td>72%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 71% | 12 | 63% | 13 | 61% | 14 | 79% | 15 | 61% | 16 | 81% | 17 | 71% | 18 | 72% | ↔ | ↑ | 1% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 71% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 63% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 79% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 81% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 71% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 72% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bristol Water (2018 base sample: 300) | 60.6% | <table><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>11</td><td>64%</td></tr><tr><td>12</td><td>61%</td></tr><tr><td>13</td><td>51%</td></tr><tr><td>14</td><td>64%</td></tr><tr><td>15</td><td>59%</td></tr><tr><td>16</td><td>51%</td></tr><tr><td>17</td><td>67%</td></tr><tr><td>18</td><td>68%</td></tr></tbody></table> | | | | | | | Year | Value | 11 | 64% | 12 | 61% | 13 | 51% | 14 | 64% | 15 | 59% | 16 | 51% | 17 | 67% | 18 | 68% | ↔ | ↑ | 0% |
| Year | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 64% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 61% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 51% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 64% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 59% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 51% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 67% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 68% | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|--|-------|--|---|---|------|
| Cambridge Water (2018 base sample: 150) | 66.1% | | ↓ | ↔ | -3% |
| Essex & Suffolk Water (2018 base sample: 152) | 60.3% | | ↓ | ↔ | 4% |
| Hartlepool Water (2018 base sample: 150) | 71.3% | | ↔ | ↔ | -1% |
| Portsmouth Water (2018 base sample: 150) | 68.0% | | ↔ | ↔ | -12% |
| South East Water (2018 base sample: 150) | 61.0% | | ↔ | ↔ | 2% |
| South Staffs Water (2018 base sample: 153) | 65.6% | | ↔ | ↔ | -15% |
| SES Water (2018 base sample: 150) | 62.4% | | ↓ | ↔ | 0% |

2.4 Affordability of charges

Customers were asked to what extent they agree that the water and/ or sewerage charges they pay are affordable. Figure 16 shows eight-year trends for perceptions of affordability at national levels; this is followed by Table 14 which shows affordability trends by WaSC. The customers of WoCs are asked for their views about the affordability of water and of sewerage services separately (Table 15 and Table 16) before being asked about the total bill (Table 17). This reflects that their charges are due to the two different companies that provide water and sewerages. Mostly, these charges are shown on one bill which is sent by the water service provider, but some customers of WoCs are sent a separate bill for each service.

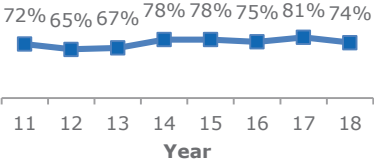
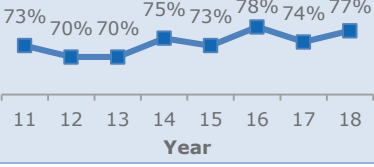
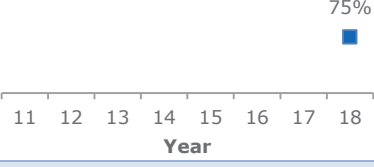
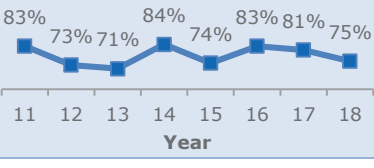

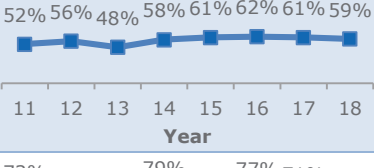
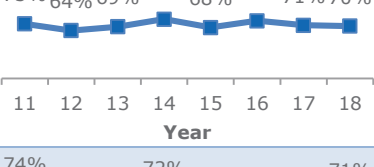
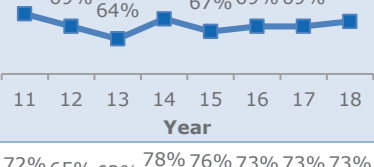
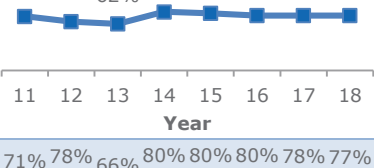

Figure 16: Affordability of water and sewerage charges



Footnote: The percentages are based on affordability of the total bill as assessed by WaSC customers and by WoC customers after they have rated the affordability of water and sewerage services separately to reflect that the charges come from two different service providers.

Table 14: Affordability of water and sewerage charges – WaSCs

| Agree charges are affordable | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--------------------------------------|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 72.5% | | | | | | | | | ↔ | n/a | -1% |
| Total WaSCs (2018 base sample: 3202) | 72.3% | | | | | | | | | ↔ | 74% | 0% |

| | | | | | |
|--|-------|--|-----|---|-----|
| Anglian Water (2018 base sample: 400) | 73.6% |  <p>72% 65% 67% 78% 78% 75% 81% 74%</p> <p>Year</p> | ↑ | ↔ | -7% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 73.7% |  <p>73% 70% 70% 75% 73% 78% 74% 77%</p> <p>Year</p> | ↑ | ↔ | 3% |
| Hafren Dyfrdwy (2018 base sample: 201) | 75.3% |  <p>75%</p> <p>Year</p> | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 78.1% |  <p>83% 73% 71% 84% 74% 83% 81% 75%</p> <p>Year</p> | ↔ | ↔ | -6% |
| Severn Trent Water (2018 base sample: 200) | 73.1% |  <p>71% 64% 70% 74% 77% 78% 75% 77%</p> <p>Year</p> | ↑ | ↔ | 2% |
| South West Water (2018 base sample: 200) | 57.0% |  <p>52% 56% 48% 58% 61% 62% 61% 59%</p> <p>Year</p> | ↑ | ↓ | -2% |
| Southern Water (2018 base sample: 200) | 71.5% |  <p>73% 64% 69% 79% 68% 77% 71% 70%</p> <p>Year</p> | ↔ | ↔ | -1% |
| Thames Water (2018 base sample: 200) | 69.4% |  <p>74% 69% 64% 72% 67% 69% 69% 71%</p> <p>Year</p> | ↔ | ↔ | 3% |
| United Utilities (2018 base sample: 400) | 71.5% |  <p>72% 65% 62% 78% 76% 73% 73% 73%</p> <p>Year</p> | ↔ | ↔ | 0% |
| Wessex Water (2018 base sample: 200) | 76.1% |  <p>71% 78% 66% 80% 80% 80% 78% 77%</p> <p>Year</p> | ↑ | ↔ | -1% |

| | | | | | |
|---|-------|---|---|---|----|
| Yorkshire Water (2018 base sample: 400) | 76.3% | <p>87% 65% 70% 80% 79% 77% 76% 76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |
|---|-------|---|---|---|----|

Footnote: Customers of WaSCs were asked about the affordability of water and of sewerage service charges together as they are charged on one bill.

Table 15: Affordability of water charges – WoCs

| Agree water charges are affordable | Eight-year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|---|------------------|--------------------------------|------------------------|
| Industry (2018 base sample: 5158) | 75.0% | <p>78% 71% 69% 78% 79% 74% 77% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | n/a | -2% |
| Total WoCs (2018 base sample: 1956) | 75.0% | <p>78% 71% 69% 78% 79% 74% 77% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | 74% | -2% |
| Affinity Water Central (2018 base sample: 150) | 71.9% | <p>77% 67% 63% 73% 78% 74% 74% 69%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -5% |
| Affinity Water East (2018 base sample: 151) | 73.0% | <p>77% 65% 65% 81% 73% 73% 78% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -8% |
| Affinity Water Southeast (2018 base sample: 150) | 73.3% | <p>79% 75% 64% 78% 77% 77% 66% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 5% |
| Bournemouth Water (2018 base sample: 150) | 80.7% | <p>82% 73% 73% 88% 77% 89% 82% 82%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 1% |
| Bristol Water (2018 base sample: 300) | 74.4% | <p>75% 74% 68% 76% 77% 65% 80% 81%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | 2% |

| | | | | | |
|--|-------|---|---|---|------|
| Cambridge Water (2018 base sample: 150) | 81.2% | <p>85% 83% 79% 82% 82% 79% 78% 82%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↑ | 4% |
| Essex & Suffolk Water (2018 base sample: 152) | 73.4% | <p>78% 70% 73% 78% 75% 69% 73% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | -1% |
| Hartlepool Water (2018 base sample: 150) | 80.8% | <p>83% 73% 79% 87% 85% 81% 79% 80%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 1% |
| Portsmouth Water (2018 base sample: 150) | 81.1% | <p>83% 72% 83% 81% 85% 81% 87% 77%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -9% |
| South East Water (2018 base sample: 150) | 75.5% | <p>80% 71% 71% 79% 79% 74% 73% 77%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 4% |
| South Staffs Water (2018 base sample: 153) | 77.0% | <p>76% 77% 70% 78% 85% 74% 84% 71%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -14% |
| SES Water (2018 base sample: 150) | 74.6% | <p>73% 73% 67% 85% 77% 76% 71% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 4% |

Footnote: Customers of WoCs were asked about the affordability of water service charges and of sewerage service charges separately as they are charged by a different company for each.

Table 16: Affordability of sewerage charges – WoCs


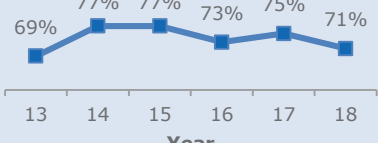
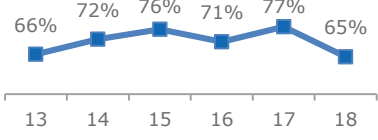
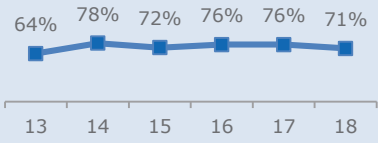
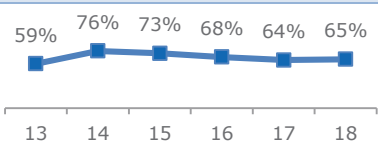
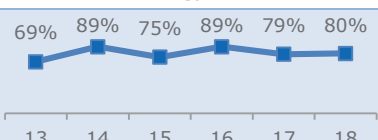
| Agree sewerage charges are affordable | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year | | | | | | | | | | | | | | | | | | |
|---------------------------------------|------------------------------------|---|-----|-----|-----|-----|-----|-----|-----|------------------|--------------------------------|------------------------|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|---|-----|-----|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | | | | | | | | | | | | | | | | | | | |
| Industry (2018 base sample: 5158) | 73.9% | <table border="1"><thead><tr><th>Year</th><th>Percentage</th></tr></thead><tbody><tr><td>11</td><td>78%</td></tr><tr><td>12</td><td>70%</td></tr><tr><td>13</td><td>68%</td></tr><tr><td>14</td><td>78%</td></tr><tr><td>15</td><td>78%</td></tr><tr><td>16</td><td>72%</td></tr><tr><td>17</td><td>74%</td></tr><tr><td>18</td><td>73%</td></tr></tbody></table> | | | | | | | | Year | Percentage | 11 | 78% | 12 | 70% | 13 | 68% | 14 | 78% | 15 | 78% | 16 | 72% | 17 | 74% | 18 | 73% | ↔ | 73% | -2% |
| Year | Percentage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 78% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 70% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 68% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 78% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 78% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 72% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 74% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 73% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|---|-------|-------------|---|-----|------|
| Total WoCs (2018 base sample: 1956) | 73.9% | <p>Year</p> | ↔ | 73% | -2% |
| Affinity Water Central (2018 base sample: 150) | 71.3% | <p>Year</p> | ↔ | ↔ | -5% |
| Affinity Water East (2018 base sample: 151) | 71.4% | <p>Year</p> | ↔ | ↔ | -4% |
| Affinity Water Southeast (2018 base sample: 150) | 69.1% | <p>Year</p> | ↓ | ↓ | 3% |
| Bournemouth Water (2018 base sample: 150) | 78.4% | <p>Year</p> | ↔ | ↔ | 1% |
| Bristol Water (2018 base sample: 300) | 74.6% | <p>Year</p> | ↔ | ↑ | 1% |
| Cambridge Water (2018 base sample: 150) | 79.0% | <p>Year</p> | ↔ | ↑ | 8% |
| Essex & Suffolk Water (2018 base sample: 152) | 72.3% | <p>Year</p> | ↔ | ↔ | -1% |
| Hartlepool Water (2018 base sample: 150) | 80.3% | <p>Year</p> | ↔ | ↔ | 4% |
| Portsmouth Water (2018 base sample: 150) | 76.7% | <p>Year</p> | ↔ | ↔ | -14% |

| | | | | | |
|---|-------|---|---|---|-----|
| South East Water (2018 base sample: 150) | 74.3% | <p>81% 71% 65% 79% 79% 72% 70% 77%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 7% |
| South Staffs Water (2018 base sample: 153) | 76.6% | <p>78% 75% 67% 81% 84% 73% 80% 73%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -7% |
| SES Water (2018 base sample: 150) | 73.7% | <p>71% 75% 71% 83% 75% 75% 70% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |

Footnote: Customers of WoCs were asked about the affordability of water service charges and of sewerage service charges separately as they are charged by a different company for each.

Table 17: Affordability of total water and sewerage charges – WoCs

| Agree total charges are affordable | Six-year rolling company average | Six-year company trend | | | | | | Six-year trend | Company average vs WoC average | Change since last year |
|---|----------------------------------|---|-----|-----|-----|-----|-----|----------------|--------------------------------|------------------------|
| | | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 73.7% |  | | | | | | ↔ | 71% | -4% |
| Total WoCs (2018 base sample: 1956) | 73.7% |  | | | | | | ↔ | 71% | -4% |
| Affinity Water Central (2018 base sample: 150) | 70.9% |  | | | | | | ↔ | ↔ | -12% |
| Affinity Water East (2018 base sample: 151) | 72.6% |  | | | | | | ↔ | ↔ | -5% |
| Affinity Water Southeast (2018 base sample: 150) | 67.5% |  | | | | | | ↔ | ↔ | 1% |
| Bournemouth Water (2018 base sample: 150) | 79.9% |  | | | | | | ↔ | ↑ | 1% |

| | | | | | |
|---|-------|---|---|---|------|
| Bristol Water (2018 base sample: 300) | 72.9% |  | ↔ | ↑ | 1% |
| Cambridge Water (2018 base sample: 150) | 79.8% |  | ↔ | ↑ | 1% |
| Essex & Suffolk Water (2018 base sample: 152) | 72.0% |  | ↓ | ↔ | -3% |
| Hartlepool Water (2018 base sample: 150) | 79.8% |  | ↔ | ↔ | -3% |
| Portsmouth Water (2018 base sample: 150) | 78.4% |  | ↔ | ↔ | -17% |
| South East Water (2018 base sample: 150) | 73.4% |  | ↔ | ↔ | 8% |
| South Staffs Water (2018 base sample: 153) | 76.3% |  | ↔ | ↔ | -7% |
| SES Water (2018 base sample: 150) | 75.5% |  | ↓ | ↔ | 0% |

Footnote: Customers of WoCs were first asked about the affordability of water services and of sewerage services separately as they are charged by a different company for each. Since 2013, they have been asked about the affordability of the total water and sewerage bill which is shown above.

Chapter 3: Awareness of WaterSure support tariff, Priority Services and metering options

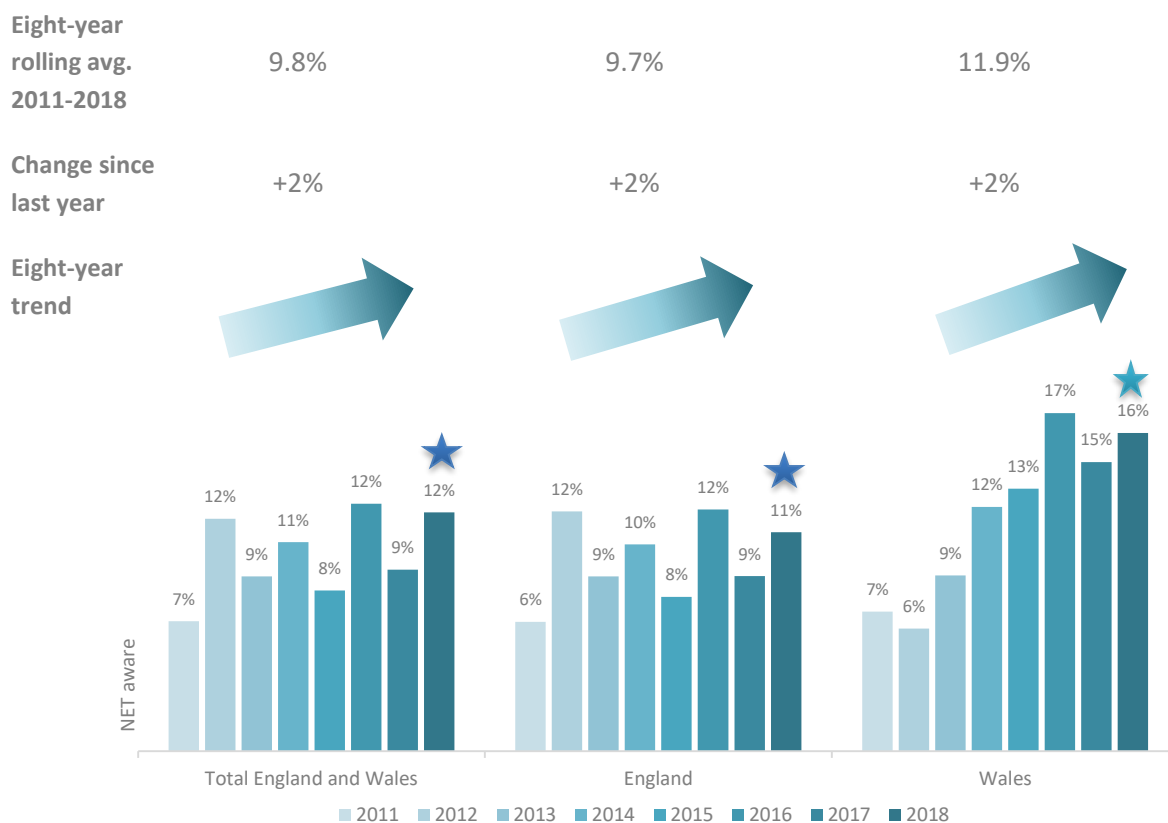
Water companies are obliged to provide financial support schemes specifically designed for low income customers who struggle to afford their bills. They also offer priority services to customers with specific requirements to ensure accessing services is as easy as possible. This includes the provision of large print or Braille bills, passwords to check that company callers are genuine, and liaison with customers on dialysis who need a constant supply of water.

3.1 Awareness of WaterSure/ WaterSure Wales

The WaterSure tariff is provided by all companies in England and Wales. It aims to help customers in genuine financial hardship who struggle to afford their water charges by capping their annual charge so it is no more than the average metered bill for the company that serves them. Customers must first meet a number of criteria to be eligible for WaterSure. To understand awareness of the WaterSure social tariff, customers were asked if they had ever heard of it or were subscribed to it.

Figure 17 shows awareness and take-up across England and Wales, and for each nation over the last eight years. This is followed by Table 18 and Table 19 which shows awareness and take-up for WaSCs and for WoCs respectively.

Figure 17: Awareness of WaterSure/ WaterSure Wales



★ Significant difference between England and Wales 2018 ★ Significant difference between 2017-2018

Footnote: Percentages reflect customers who are aware but not subscribed and customers who are subscribed.

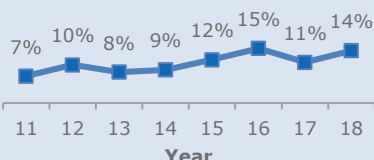
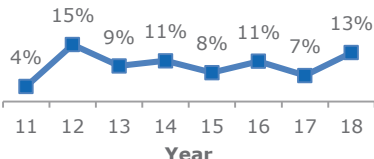
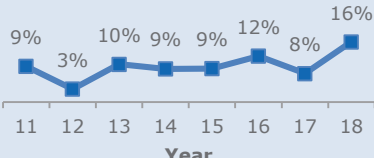
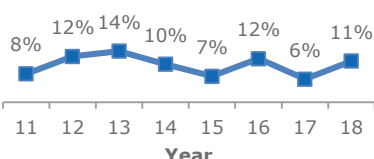
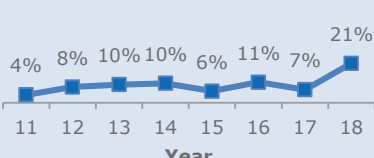
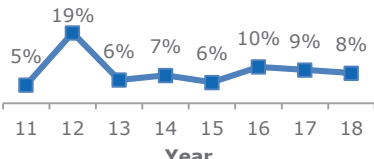
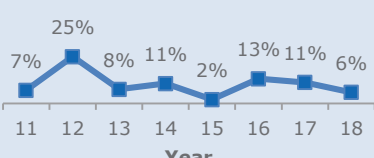
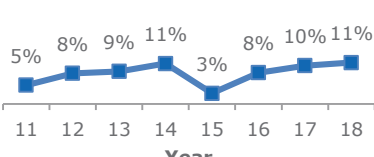
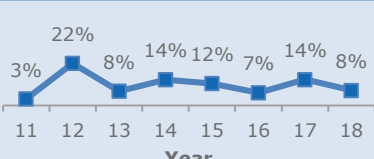
Table 18: Awareness of WaterSure/ WaterSure Wales – WaSCs

| Awareness of WaterSure/ WaterSure Wales | Eight-year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight-year trend | Company average vs WaSC average | Change since last year | | | | | | | | | | | | | | | | | | |
|---|------------------------------------|--|------------------|---------------------------------|------------------------|-----|-----|-----|----|----|----|---------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Industry (2018 base sample: 5158) | 9.8% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>12%</td><td>9%</td><td>11%</td><td>8%</td><td>12%</td><td>9%</td><td>12%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 7% | 12% | 9% | 11% | 8% | 12% | 9% | 12% | ↑ | n/a | 2% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 7% | 12% | 9% | 11% | 8% | 12% | 9% | 12% | | | | | | | | | | | | | | | |
| Total WaSCs (2018 base sample: 3202) | 10.0% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>11%</td><td>9%</td><td>11%</td><td>9%</td><td>13%</td><td>9%</td><td>12%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 7% | 11% | 9% | 11% | 9% | 13% | 9% | 12% | ↑ | 12% | 3% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 7% | 11% | 9% | 11% | 9% | 13% | 9% | 12% | | | | | | | | | | | | | | | |
| Anglian Water (2018 base sample: 400) | 12.5% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>9%</td><td>10%</td><td>14%</td><td>11%</td><td>13%</td><td>17%</td><td>11%</td><td>15%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 9% | 10% | 14% | 11% | 13% | 17% | 11% | 15% | ↑ | ↔ | 3% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 9% | 10% | 14% | 11% | 13% | 17% | 11% | 15% | | | | | | | | | | | | | | | |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 12.1% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>6%</td><td>9%</td><td>13%</td><td>13%</td><td>18%</td><td>15%</td><td>17%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 7% | 6% | 9% | 13% | 13% | 18% | 15% | 17% | ↑ | ↑ | 2% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 7% | 6% | 9% | 13% | 13% | 18% | 15% | 17% | | | | | | | | | | | | | | | |
| Hafren Dyfrdwy (2018 base sample: 201) | 10.7% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>11%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | | | | | | | | 11% | n/a | ↔ | n/a |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | | | | | | | | 11% | | | | | | | | | | | | | | | |
| Northumbrian Water (2018 base sample: 400) | 7.8% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>4%</td><td>4%</td><td>9%</td><td>11%</td><td>9%</td><td>12%</td><td>6%</td><td>8%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 4% | 4% | 9% | 11% | 9% | 12% | 6% | 8% | ↑ | ↔ | 2% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 4% | 4% | 9% | 11% | 9% | 12% | 6% | 8% | | | | | | | | | | | | | | | |
| Severn Trent Water (2018 base sample: 200) | 7.7% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>6%</td><td>7%</td><td>6%</td><td>9%</td><td>7%</td><td>10%</td><td>7%</td><td>10%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 6% | 7% | 6% | 9% | 7% | 10% | 7% | 10% | ↑ | ↔ | 3% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 6% | 7% | 6% | 9% | 7% | 10% | 7% | 10% | | | | | | | | | | | | | | | |
| South West Water (2018 base sample: 200) | 19.2% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>19%</td><td>25%</td><td>19%</td><td>18%</td><td>17%</td><td>20%</td><td>18%</td><td>17%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 19% | 25% | 19% | 18% | 17% | 20% | 18% | 17% | ↔ | ↑ | -1% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 19% | 25% | 19% | 18% | 17% | 20% | 18% | 17% | | | | | | | | | | | | | | | |
| Southern Water (2018 base sample: 200) | 14.1% | <table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th></tr><tr><td>Awareness (%)</td><td>8%</td><td>36%</td><td>14%</td><td>12%</td><td>10%</td><td>14%</td><td>10%</td><td>14%</td></tr></table> | Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | Awareness (%) | 8% | 36% | 14% | 12% | 10% | 14% | 10% | 14% | ↔ | ↔ | 4% |
| Year | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | | | | | | | | | | | | | | |
| Awareness (%) | 8% | 36% | 14% | 12% | 10% | 14% | 10% | 14% | | | | | | | | | | | | | | | |

| | | | | | |
|--|-------|-------------|---|---|----|
| Thames Water (2018 base sample: 200) | 10.9% | <p>Year</p> | ↔ | ↔ | 5% |
| United Utilities (2018 base sample: 400) | 7.3% | <p>Year</p> | ↔ | ↓ | 2% |
| Wessex Water (2018 base sample: 200) | 10.5% | <p>Year</p> | ↔ | ↔ | 2% |
| Yorkshire Water (2018 base sample: 400) | 8.0% | <p>Year</p> | ↑ | ↔ | 2% |

Table 19: Awareness of WaterSure – WoCs

| Awareness of WaterSure | Eight- year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight- year trend | Company average vs WoC average | Change since last year |
|---|---|---|-------------------------|---|------------------------------|
| Industry (2018 base sample: 5158) | 9.8% | <p>Year</p> | ↑ | n/a | 2% |
| Total WoCs (2018 base sample: 1956) | 9.4% | <p>Year</p> | ↑ | 10% | 1% |
| Affinity Water Central (2018 base sample: 150) | 8.1% | <p>Year</p> | ↑ | ↔ | 1% |
| Affinity Water East (2018 base sample: 151) | 17.4% | <p>Year</p> | ↔ | ↑ | 7% |
| Affinity Water Southeast (2018 base sample: 150) | 14.7% | <p>Year</p> | ↑ | ↔ | -4% |

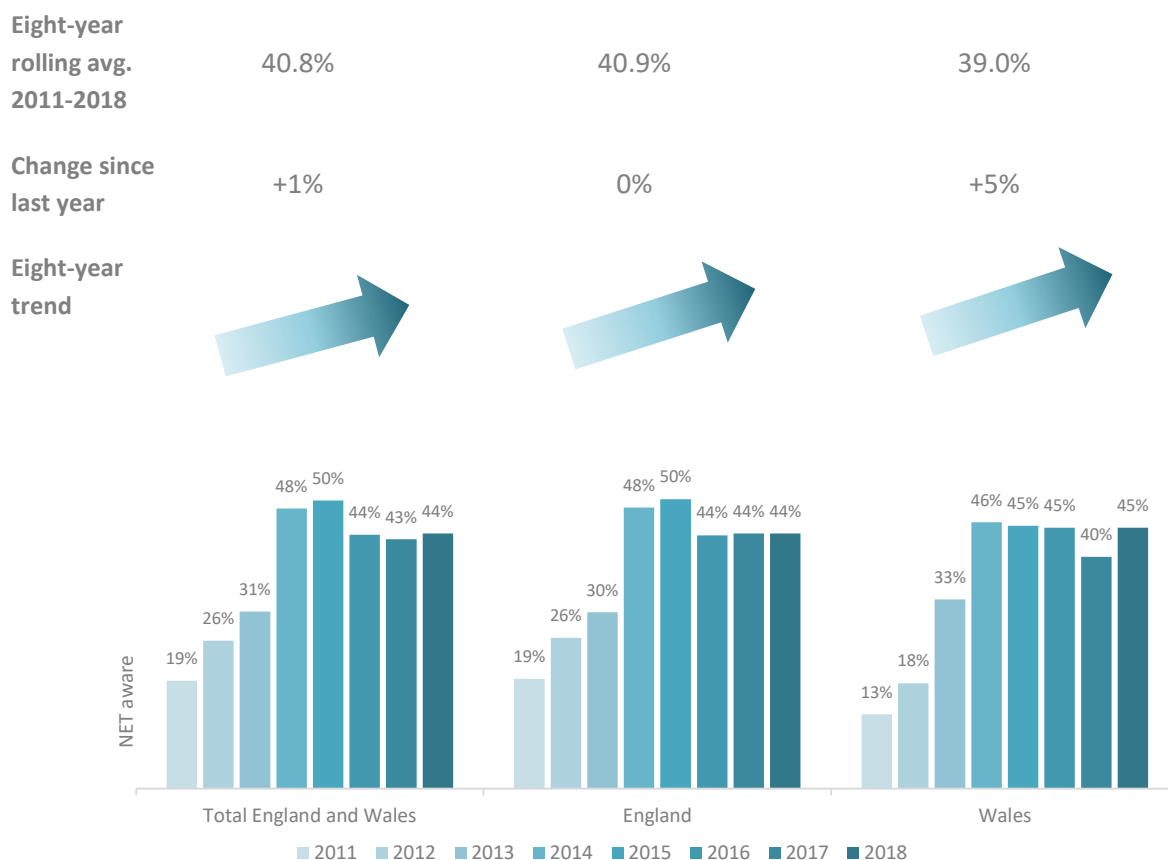
| Bournemouth Water (2018 base sample: 150) | 10.7% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>7%</td><td>10%</td><td>8%</td><td>9%</td><td>12%</td><td>15%</td><td>11%</td><td>14%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 7% | 10% | 8% | 9% | 12% | 15% | 11% | 14% | ↑ | ↔ | 3% |
|--|-------|---|------|------|------|------|------|------|------|------|------|------------|----|-----|-----|-----|-----|-----|-----|-----|---|---|-----|
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 7% | 10% | 8% | 9% | 12% | 15% | 11% | 14% | | | | | | | | | | | | | | | |
| Bristol Water (2018 base sample: 300) | 9.6% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>4%</td><td>15%</td><td>9%</td><td>11%</td><td>8%</td><td>11%</td><td>7%</td><td>13%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 4% | 15% | 9% | 11% | 8% | 11% | 7% | 13% | ↔ | ↔ | 6% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 4% | 15% | 9% | 11% | 8% | 11% | 7% | 13% | | | | | | | | | | | | | | | |
| Cambridge Water (2018 base sample: 150) | 9.6% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>9%</td><td>3%</td><td>10%</td><td>9%</td><td>9%</td><td>12%</td><td>8%</td><td>16%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 9% | 3% | 10% | 9% | 9% | 12% | 8% | 16% | ↑ | ↑ | 8% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 9% | 3% | 10% | 9% | 9% | 12% | 8% | 16% | | | | | | | | | | | | | | | |
| Essex & Suffolk Water (2018 base sample: 152) | 9.9% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>8%</td><td>12%</td><td>14%</td><td>10%</td><td>7%</td><td>12%</td><td>6%</td><td>11%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 8% | 12% | 14% | 10% | 7% | 12% | 6% | 11% | ↔ | ↔ | 5% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 8% | 12% | 14% | 10% | 7% | 12% | 6% | 11% | | | | | | | | | | | | | | | |
| Hartlepool Water (2018 base sample: 150) | 9.8% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>4%</td><td>8%</td><td>10%</td><td>10%</td><td>6%</td><td>11%</td><td>7%</td><td>21%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 4% | 8% | 10% | 10% | 6% | 11% | 7% | 21% | ↑ | ↑ | 14% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 4% | 8% | 10% | 10% | 6% | 11% | 7% | 21% | | | | | | | | | | | | | | | |
| Portsmouth Water (2018 base sample: 150) | 8.6% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>5%</td><td>19%</td><td>6%</td><td>7%</td><td>6%</td><td>10%</td><td>9%</td><td>8%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 5% | 19% | 6% | 7% | 6% | 10% | 9% | 8% | ↔ | ↔ | -1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 5% | 19% | 6% | 7% | 6% | 10% | 9% | 8% | | | | | | | | | | | | | | | |
| South East Water (2018 base sample: 150) | 9.9% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>7%</td><td>25%</td><td>8%</td><td>11%</td><td>2%</td><td>13%</td><td>11%</td><td>6%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 7% | 25% | 8% | 11% | 2% | 13% | 11% | 6% | ↔ | ↓ | -6% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 7% | 25% | 8% | 11% | 2% | 13% | 11% | 6% | | | | | | | | | | | | | | | |
| South Staffs Water (2018 base sample: 153) | 8.2% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>5%</td><td>8%</td><td>9%</td><td>11%</td><td>3%</td><td>8%</td><td>10%</td><td>11%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 5% | 8% | 9% | 11% | 3% | 8% | 10% | 11% | ↑ | ↔ | 1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 5% | 8% | 9% | 11% | 3% | 8% | 10% | 11% | | | | | | | | | | | | | | | |
| SES Water (2018 base sample: 150) | 10.6% |  <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>3%</td><td>22%</td><td>8%</td><td>14%</td><td>12%</td><td>7%</td><td>14%</td><td>8%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 3% | 22% | 8% | 14% | 12% | 7% | 14% | 8% | ↔ | ↔ | -6% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 3% | 22% | 8% | 14% | 12% | 7% | 14% | 8% | | | | | | | | | | | | | | | |

3.2 Awareness of Priority Services

Respondents are asked if they are aware of any additional services provided by their water company such as large print or Braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water. It should be noted that the question wording changed in 2014 to its current form (footnote below).

Figure 18 shows national level awareness and trends over the last eight years. This is followed by awareness for each WaSC in Table 20, and for each WoC in Table 21.

Figure 18: Awareness of Priority Services



Footnote: Previous wording (prior to 2014) was 'Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply.'

Table 20: Awareness of Priority Services – WaSCs

| Awareness of Priority services | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--------------------------------------|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 40.8% | 19% | 26% | 31% | 48% | 50% | 44% | 43% | 44% | ↑ | n/a | 1% |
| Total WaSCs (2018 base sample: 3202) | 40.6% | 19% | 26% | 30% | 48% | 49% | 44% | 43% | 44% | ↑ | 44% | 0% |

| | | | | | |
|--|-------|---|-----|---|-----|
| Anglian Water (2018 base sample: 400) | 44.1% | <p>20% 32% 34% 51% 54% 45% 46% 47%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 1% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 39.0% | <p>12% 18% 33% 46% 45% 46% 40% 46%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 6% |
| Hafren Dyfrdwy (2018 base sample: 201) | 43.3% | <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 40.0% | <p>16% 26% 31% 43% 50% 44% 42% 45%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 3% |
| Severn Trent Water (2018 base sample: 200) | 40.6% | <p>22% 25% 26% 47% 51% 48% 46% 41%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -5% |
| South West Water (2018 base sample: 200) | 48.2% | <p>24% 35% 42% 58% 59% 45% 52% 48%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -4% |
| Southern Water (2018 base sample: 200) | 42.0% | <p>20% 34% 35% 51% 52% 39% 43% 42%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -1% |
| Thames Water (2018 base sample: 200) | 36.0% | <p>16% 27% 27% 43% 41% 37% 37% 41%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 3% |
| United Utilities (2018 base sample: 400) | 40.9% | <p>19% 22% 27% 52% 51% 45% 46% 43%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | -3% |
| Wessex Water (2018 base sample: 200) | 43.9% | <p>15% 23% 38% 52% 57% 47% 43% 49%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 6% |

| Yorkshire Water (2018 base sample: 400) | 41.7% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Awareness (%)</td><td>20%</td><td>26%</td><td>32%</td><td>48%</td><td>47%</td><td>48%</td><td>45%</td><td>47%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Awareness (%) | 20% | 26% | 32% | 48% | 47% | 48% | 45% | 47% | ↑ | ↔ | 2% |
|---|-------|--|------|------|------|------|------|------|------|------|------|---------------|-----|-----|-----|-----|-----|-----|-----|-----|---|---|----|
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Awareness (%) | 20% | 26% | 32% | 48% | 47% | 48% | 45% | 47% | | | | | | | | | | | | | | | |

Footnote: Previous wording (prior to 2014) was 'Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply.'

Table 21: Awareness of Priority Services – WoCs

| Awareness of Priority services | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|--------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 40.8% | 19% | 26% | 31% | 48% | 50% | 44% | 43% | 44% | ↑ | n/a | 1% |
| Total WoCs (2018 base sample: 1956) | 41.5% | 18% | 23% | 32% | 50% | 52% | 43% | 44% | 46% | ↑ | 46% | 2% |
| Affinity Water Central (2018 base sample: 150) | 37.3% | 16% | 21% | 33% | 41% | 48% | 37% | 41% | 40% | ↑ | ↔ | -1% |
| Affinity Water East (2018 base sample: 151) | 44.1% | 26% | 32% | 38% | 51% | 53% | 42% | 44% | 50% | ↑ | ↔ | 6% |
| Affinity Water Southeast (2018 base sample: 150) | 42.7% | 23% | 21% | 33% | 56% | 54% | 51% | 43% | 41% | ↑ | ↔ | -2% |
| Bournemouth Water (2018 base sample: 150) | 44.2% | 21% | 23% | 39% | 48% | 57% | 47% | 43% | 51% | ↑ | ↔ | 9% |
| Bristol Water (2018 base sample: 300) | 46.1% | 17% | 24% | 38% | 55% | 53% | 52% | 48% | 52% | ↑ | ↔ | 4% |
| Cambridge Water (2018 base sample: 150) | 44.2% | 29% | 24% | 35% | 50% | 59% | 52% | 43% | 46% | ↑ | ↔ | 3% |

| | | | | | |
|--|-------|--|---|---|-----|
| Essex & Suffolk Water (2018 base sample: 152) | 43.7% | | ↑ | ↔ | 2% |
| Hartlepool Water (2018 base sample: 150) | 43.4% | | ↑ | ↔ | -3% |
| Portsmouth Water (2018 base sample: 150) | 44.3% | | ↑ | ↔ | 0% |
| South East Water (2018 base sample: 150) | 42.8% | | ↑ | ↔ | 9% |
| South Staffs Water (2018 base sample: 153) | 40.1% | | ↑ | ↔ | 3% |
| SES Water (2018 base sample: 150) | 37.6% | | ↑ | ↓ | -8% |

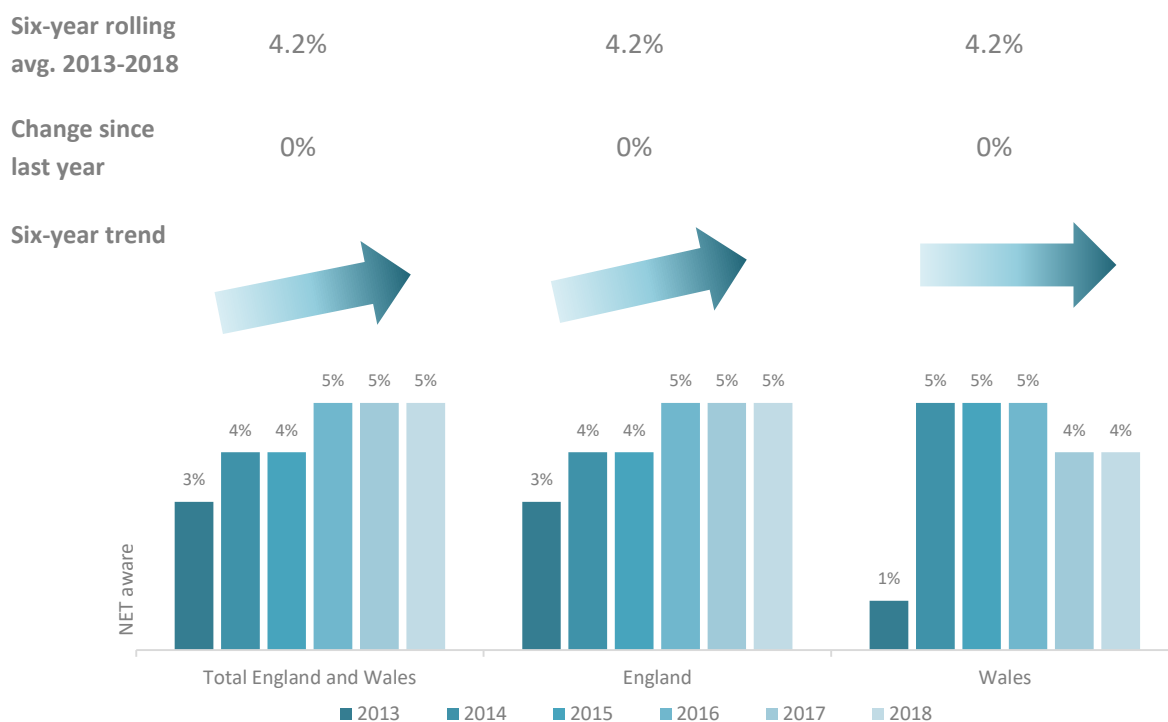
Footnote: Previous wording (prior to 2014) was 'Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply.'

3.3 Awareness of company specific social tariff schemes

Since 2013, respondents have also been asked if they are aware of any other company specific schemes designed to provide lower charges for customers who struggle to pay their bills. Figure 19 shows the proportion of customers who are aware of company specific social tariff schemes at national levels and for England and for Wales. This is followed by Table 22 and Table 23.

Table 23 which show awareness for each WaSC and for each WoC respectively.

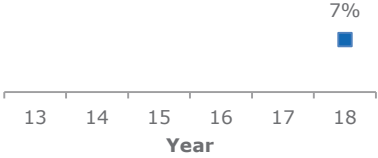

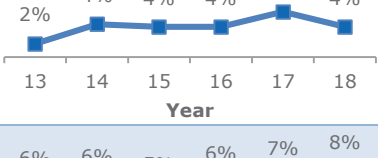
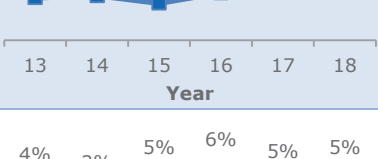
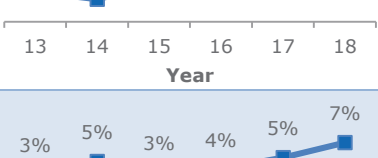
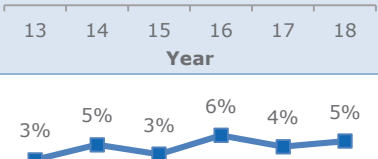
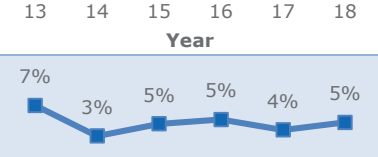
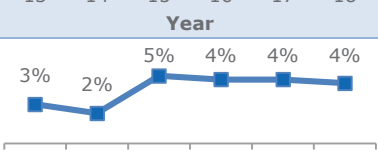
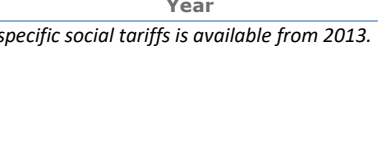
Figure 19: Awareness of company specific social tariff schemes



Footnote: Data on awareness of company specific social tariffs is available from 2013.

Table 22: Awareness of company specific social tariff schemes – WaSCs

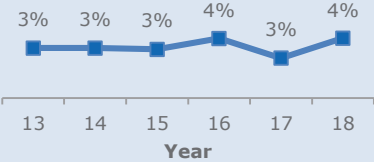
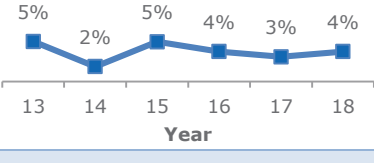
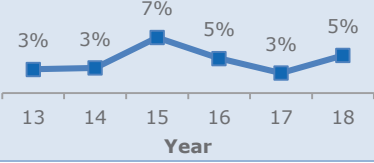
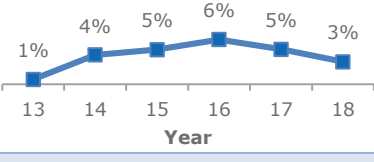

| Awareness of social tariff schemes | Six-year rolling company average | Six-year company trend '13 '14 '15 '16 '17 '18 | Six-year trend | Company average vs WaSC average | Change since last year |
|---|----------------------------------|---|----------------|---------------------------------|------------------------|
| Industry (2018 base sample: 5158) | 4.2% | | ↑ | n/a | 0% |
| Total WaSCs (2018 base sample: 3202) | 4.4% | | ↑ | 5% | 0% |
| Anglian Water (2018 base sample: 400) | 6.5% | | ↔ | ↔ | 0% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 4.2% | | ↔ | ↔ | -1% |

| | | | | | |
|--|------|---|-----|---|-----|
| Hafren Dyfrdwy (2018 base sample: 201) | 7.0% |  | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 3.0% |  | ↔ | ↔ | 1% |
| Severn Trent Water (2018 base sample: 200) | 4.0% |  | ↔ | ↔ | -2% |
| South West Water (2018 base sample: 200) | 6.3% |  | ↑ | ↔ | 1% |
| Southern Water (2018 base sample: 200) | 4.7% |  | ↔ | ↔ | 1% |
| Thames Water (2018 base sample: 200) | 4.3% |  | ↑ | ↔ | 2% |
| United Utilities (2018 base sample: 400) | 4.2% |  | ↔ | ↔ | 1% |
| Wessex Water (2018 base sample: 200) | 4.9% |  | ↔ | ↔ | 1% |
| Yorkshire Water (2018 base sample: 400) | 3.6% |  | ↔ | ↔ | 0% |

Footnote: Data on awareness of company specific social tariffs is available from 2013.

Table 23: Awareness of company specific social tariff schemes – WoCs

| Awareness of social tariff schemes | Six-year rolling company average | Six-year company trend '13 '14 '15 '16 '17 '18 | | | | | | Six-year trend | Company average vs WoC average | Change since last year |
|---|----------------------------------|---|----|----|----|----|----|----------------|--------------------------------|------------------------|
| Industry (2018 base sample: 5158) | 4.2% | 3% | 4% | 4% | 5% | 5% | 5% | ↑ | n/a | 0% |
| Total WoCs (2018 base sample: 1956) | 3.6% | 4% | 3% | 4% | 5% | 3% | 3% | ↔ | 3% | 0% |
| Affinity Water Central (2018 base sample: 150) | 2.9% | 2% | 5% | 4% | 4% | 3% | 1% | ↔ | ↔ | -2% |
| Affinity Water East (2018 base sample: 151) | 5.6% | 7% | 5% | 6% | 7% | 4% | 5% | ↔ | ↔ | 1% |
| Affinity Water Southeast (2018 base sample: 150) | 5.5% | 7% | 3% | 5% | 7% | 7% | 5% | ↔ | ↔ | -2% |
| Bournemouth Water (2018 base sample: 150) | 5.0% | 6% | 2% | 4% | 9% | 5% | 4% | ↔ | ↔ | -1% |
| Bristol Water (2018 base sample: 300) | 3.1% | 6% | 2% | 1% | 3% | 2% | 4% | ↔ | ↔ | 2% |
| Cambridge Water (2018 base sample: 150) | 4.5% | 3% | 4% | 4% | 5% | 6% | 5% | ↑ | ↔ | -1% |
| Essex & Suffolk Water (2018 base sample: 152) | 3.5% | 5% | 1% | 1% | 6% | 3% | 4% | ↔ | ↔ | 1% |

| | | | | | |
|---|------|--|---|---|-----|
| Hartlepool Water (2018 base sample: 150) | 3.4% |  | ↔ | ↔ | 1% |
| Portsmouth Water (2018 base sample: 150) | 4.0% |  | ↔ | ↔ | 1% |
| South East Water (2018 base sample: 150) | 4.3% |  | ↔ | ↔ | 2% |
| South Staffs Water (2018 base sample: 153) | 3.9% |  | ↔ | ↔ | -1% |
| SES Water (2018 base sample: 150) | 3.1% |  | ↔ | ↔ | 0% |

Footnote: Data on awareness of company specific social tariffs is available from 2013.

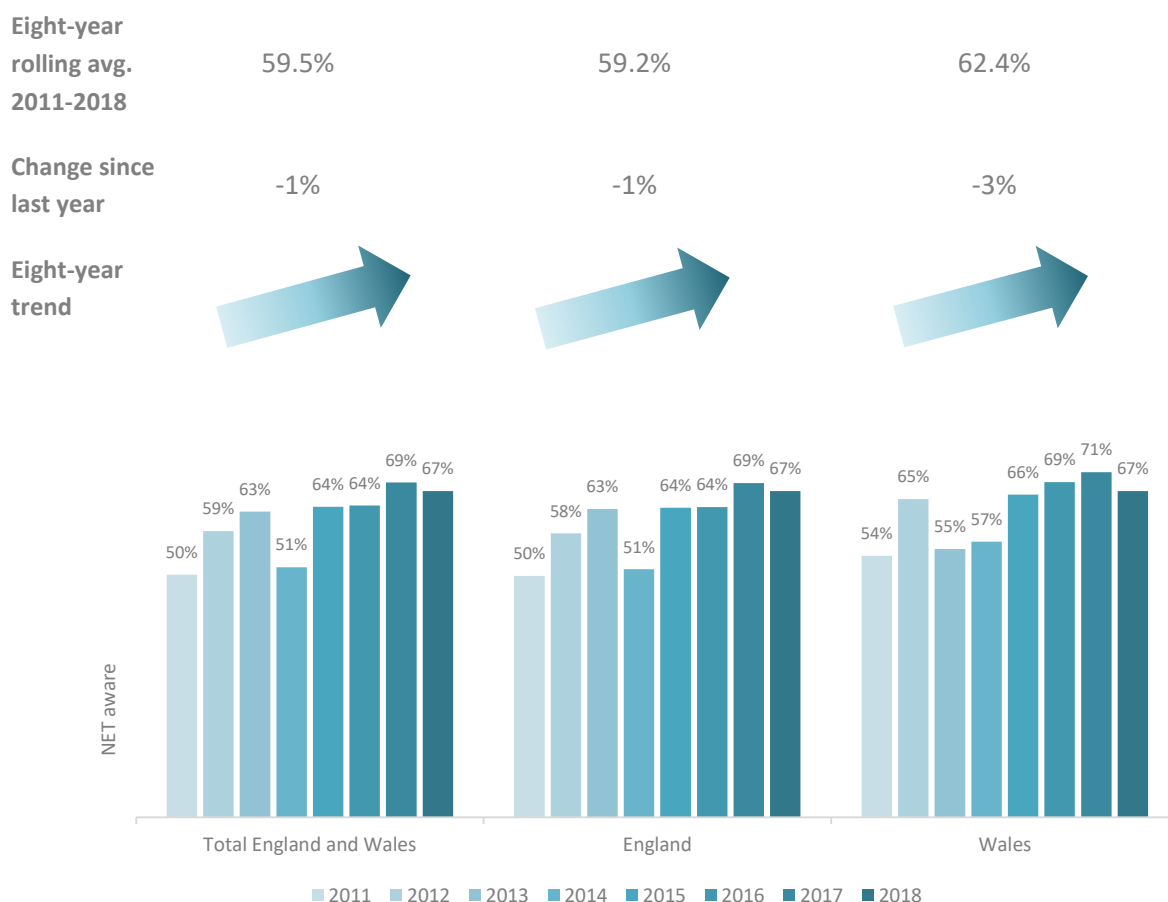
3.4 Awareness of free water meter trial schemes

Unless they live in a water company area where universal metering schemes are in place, customers who do not have a water meter at their property can ask their water company to fit a water meter. This would be at no cost to the customer provided the installation is fairly straight forward.

Respondents living in unmetered households in areas where the free meter scheme is available were first asked about their awareness that a water meter can be fitted for free.

Figure 20 shows awareness and trends at national levels, and Table 24**Table 24** and Table 25 show this for WaSCs and WoCs respectively.

Figure 20: Awareness that water meters can be fitted free of charge – unmetered customers



Footnote: Because of company universal metering schemes, customers of Southern Water, Affinity Water South East and South East Water and some of Thames Water, Affinity Water Central and Affinity Water East are not asked this question.

Table 24: Awareness that water meters can be fitted free of charge – unmetered customers - WaSCs

| Awareness that water meters can be fitted free of charge | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 59.5% | 50% | 59% | 63% | 51% | 64% | 64% | 69% | 67% | ↑ | n/a | -1% |
| Total WaSCs (2018 base sample: 3202) | 59.1% | 50% | 58% | 62% | 51% | 63% | 64% | 69% | 66% | ↑ | 66% | -3% |
| Anglian Water (2018 base sample: 400) | 66.0% | 54% | 65% | 72% | 73% | 71% | 67% | 71% | 69% | ↑ | ↔ | -3% |

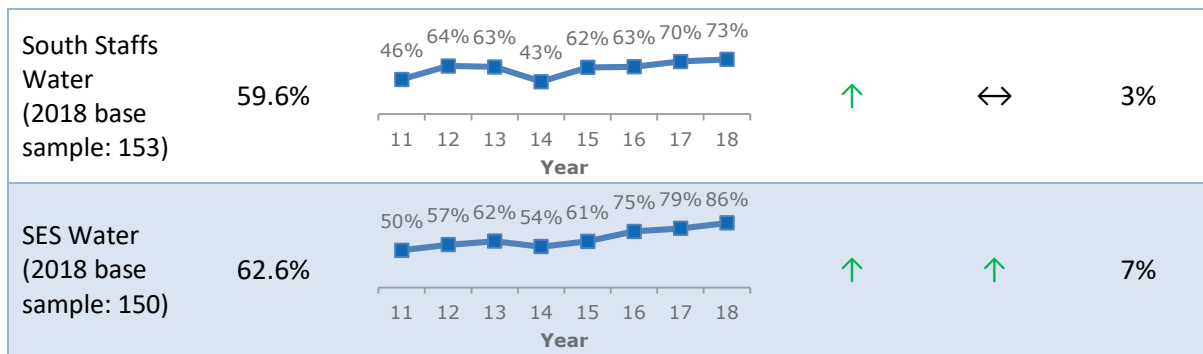
| | | | | | |
|--|-------|--|-----|---|-----|
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 62.4% | | ↑ | ↔ | -4% |
| Hafren Dyfrdwy (2018 base sample: 201) | 69.1% | | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 57.4% | | ↑ | ↔ | -5% |
| Severn Trent Water (2018 base sample: 200) | 57.3% | | ↑ | ↔ | -6% |
| South West Water (2018 base sample: 200) | 76.9% | | ↑ | ↑ | 1% |
| Thames Water (2018 base sample: 200) | 53.4% | | ↑ | ↔ | -4% |
| United Utilities (2018 base sample: 400) | 62.7% | | ↑ | ↔ | 1% |
| Wessex Water (2018 base sample: 200) | 64.9% | | ↑ | ↑ | -1% |
| Yorkshire Water (2018 base sample: 400) | 56.4% | | ↑ | ↔ | 3% |

Footnote: Customers of Southern Water and some of Thames Water are not asked this question because of their company's universal metering scheme.

Table 25: Awareness that water meters can be fitted free of charge – unmetered customers -WoCs

| Awareness that water meters can be fitted free of charge | Eight- year rolling company average | Eight-year company trend | | | | | | | | Eight- year trend | Company average vs WoC average | Change since last year |
|--|---|--------------------------|-----|-----|-----|-----|-----|-----|-----|-------------------------|---|------------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |

| | | | | | |
|---|-------|---|---|-----|-----|
| Industry (2018 base sample: 5158) | 59.5% | <p>50% 59% 63% 51% 64% 64% 69% 67%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | n/a | -1% |
| Total WoCs (2018 base sample: 1956) | 60.8% | <p>50% 63% 67% 52% 65% 64% 69% 72%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | 72% | 4% |
| Affinity Water Central (2018 base sample: 150) | 56.7% | <p>45% 64% 69% 50% 59% 53% 65% 66%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 1% |
| Affinity Water East (2018 base sample: 151) | 62.4% | <p>67% 61% 76% 60% 62% 56% 67% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 3% |
| Bournemouth Water (2018 base sample: 150) | 65.5% | <p>61% 74% 74% 49% 68% 67% 71% 75%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 4% |
| Bristol Water (2018 base sample: 300) | 63.3% | <p>48% 67% 70% 58% 72% 66% 70% 70%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 0% |
| Cambridge Water (2018 base sample: 150) | 60.2% | <p>55% 54% 59% 53% 69% 65% 60% 73%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 13% |
| Essex & Suffolk Water (2018 base sample: 152) | 67.4% | <p>52% 67% 70% 63% 75% 76% 69% 76%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 7% |
| Hartlepool Water (2018 base sample: 150) | 60.6% | <p>50% 46% 62% 52% 64% 64% 70% 81%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↑ | 11% |
| Portsmouth Water (2018 base sample: 150) | 58.1% | <p>48% 46% 62% 44% 63% 65% 72% 73%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 2% |

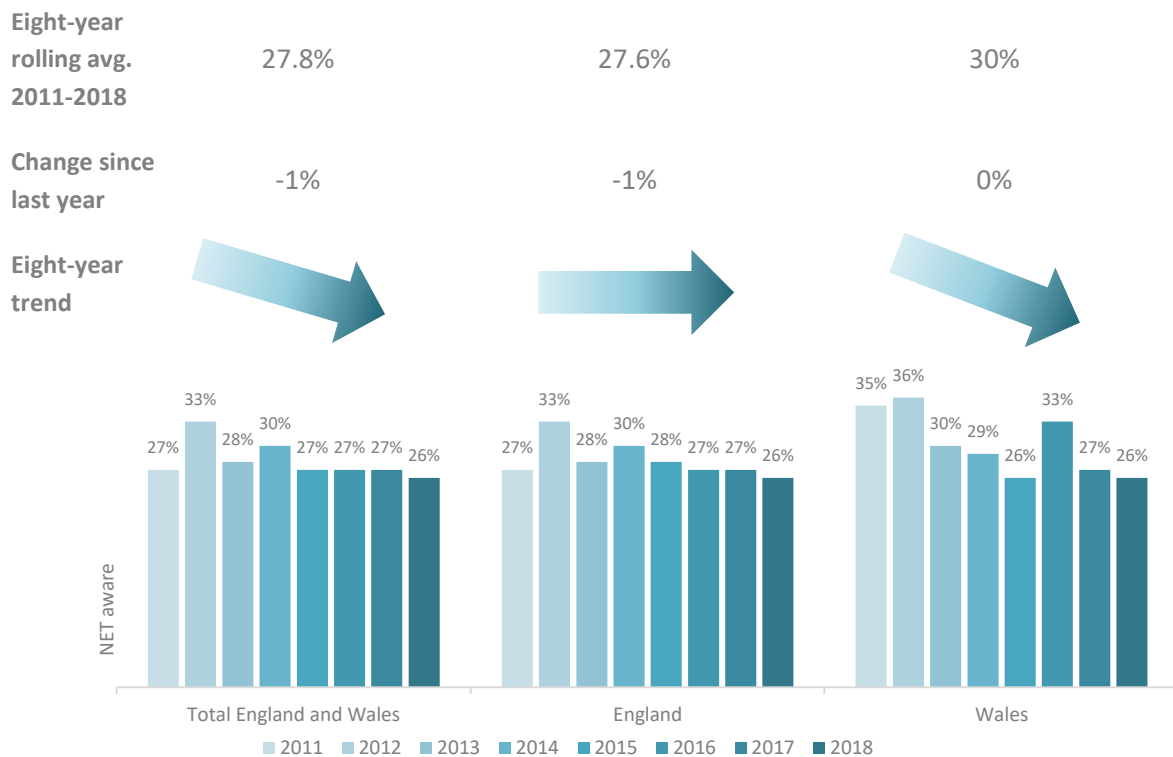


Footnote: All customers of South East Water and Affinity Water South East, as well as some of Affinity Water Central and Affinity Water East are not asked this question because of their company's universal metering scheme.

3.5 Awareness that a water meter can be trialled – unmetered customers

When a customer in an unmetered household asks for a water meter to be fitted, they can ask to go back to a fixed charge based on their property as long as it is within 24 months of the meter being fitted. Unmetered respondents were next asked whether they knew about this trial period. Awareness and trends for England and Wales and for each nation are shown in Figure 21. This is followed by Table 26 and Table 27 which show this for each WaSC and WoC respectively.

Figure 21: Awareness of the possibility to trial a water meter – unmetered customers



Footnote: Because of company universal metering schemes, customers of Southern Water, South East Water and Affinity Water South East, as well as some customers of, Thames Water, Affinity Water Central and Affinity Water East are not asked this question. Time period changed in 2018 from 1 or 2 years (dependant on company) in 2017 to 2 years for all companies in 2018.

Table 26: Awareness of the possibility to trial a water meter – unmetered customers - WaSCs

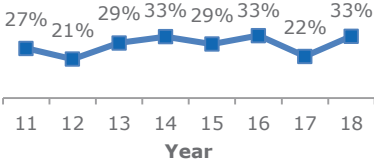

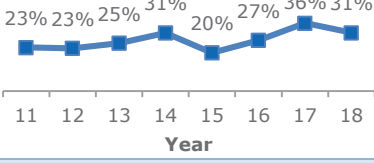

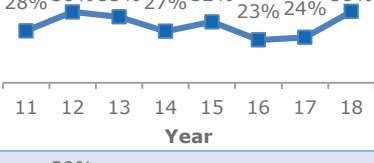

| Awareness of the 24-month trial period for a water meter | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 27.8% | 27% | 33% | 28% | 30% | 27% | 27% | 27% | 26% | ↓ | n/a | -1% |
| Total WaSCs (2018 base sample: 3202) | 28.0% | 28% | 33% | 28% | 30% | 28% | 27% | 28% | 26% | ↓ | 26% | -2% |
| Anglian Water (2018 base sample: 400) | 37.7% | 34% | 44% | 45% | 46% | 31% | 45% | 30% | 33% | ↔ | ↔ | 3% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 30.1% | 35% | 37% | 29% | 30% | 26% | 34% | 27% | 26% | ↓ | ↔ | 0% |
| Hafren Dyfrdwy (2018 base sample: 201) | 29.6% | | | | | | | | 30% | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 26.0% | 21% | 30% | 31% | 23% | 24% | 34% | 28% | 20% | ↔ | ↔ | -8% |
| Severn Trent Water (2018 base sample: 200) | 24.4% | 33% | 30% | 26% | 26% | 23% | 17% | 20% | 20% | ↓ | ↔ | 0% |
| South West Water (2018 base sample: 200) | 42.5% | 40% | 57% | 52% | 42% | 48% | 40% | 36% | 35% | ↔ | ↔ | -1% |
| Thames Water (2018 base sample: 200) | 24.3% | 25% | 28% | 20% | 25% | 28% | 26% | 24% | 27% | ↔ | ↔ | 3% |

| | | | | | |
|--|-------|--|---|---|------|
| United Utilities (2018 base sample: 400) | 30.7% | | ↔ | ↔ | -10% |
| Wessex Water (2018 base sample: 200) | 32.3% | | ↔ | ↑ | 8% |
| Yorkshire Water (2018 base sample: 400) | 26.6% | | ↔ | ↔ | -1% |

Footnote: Customers of Southern Water and some of Thames Water are excluded from this question because of the company's universal metering scheme

Table 27: Awareness of the possibility to trial a water meter – unmetered customers - WoCs

| Awareness of the 24-month trial period for a water meter | Eight-year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|---|------------------|--------------------------------|------------------------|
| Industry (2018 base sample: 5158) | 27.8% | | ↓ | n/a | -1% |
| Total WoCs (2018 base sample: 1956) | 27.0% | | ↔ | 27% | 2% |
| Affinity Water Central (2018 base sample: 150) | 25.0% | | ↔ | ↔ | -8% |
| Affinity Water East (2018 base sample: 151) | 27.9% | | ↓ | ↔ | -4% |
| Bournemouth Water (2018 base sample: 150) | 29.7% | | ↓ | ↔ | 7% |
| Bristol Water (2018 base sample: 300) | 28.8% | | ↔ | ↔ | 11% |

| | | | | | |
|--|-------|---|---|---|------|
| Cambridge Water (2018 base sample: 150) | 26.8% |  | ↔ | ↔ | 10% |
| Essex & Suffolk Water (2018 base sample: 152) | 26.8% |  | ↔ | ↔ | -5% |
| Hartlepool Water (2018 base sample: 150) | 26.5% |  | ↑ | ↔ | -5% |
| Portsmouth Water (2018 base sample: 150) | 26.9% |  | ↔ | ↔ | -10% |
| South Staffs Water (2018 base sample: 153) | 30.2% |  | ↔ | ↑ | 13% |
| SES Water (2018 base sample: 150) | 25.3% |  | ↔ | ↔ | 8% |

Footnote: All customers of South East Water and Affinity Water South East as well as some customers of Affinity Water Central and Affinity Water East are excluded from this question because of the companies' compulsory metering schemes

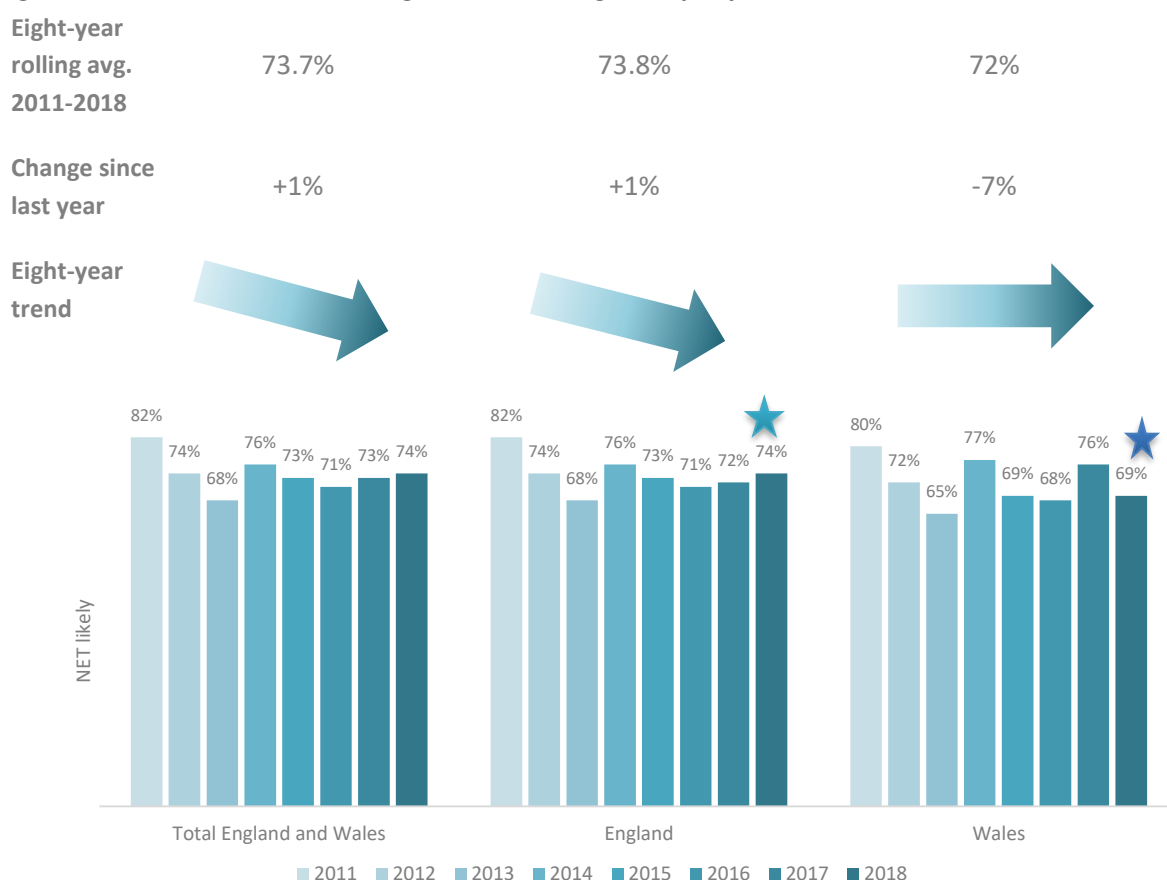
Chapter 4: Contacting water companies and satisfaction with customer service

This chapter presents views on customer contact with their water/sewerage company. Questions range from the likelihood of making contact where worried about a bill, to satisfaction with any contact made in the 12 months prior to this survey, identifying the reason for contact and satisfaction with elements of the contact and overall satisfaction with customer services in general.

4.1 Likelihood of making contact with the company if worried about paying the bill

Respondents are asked how likely they would be to contact their water company if they were worried about paying a bill. Figure 22 shows likelihood at national levels, and Table 28 and Table 29 show this for each WaSC and for each WoC respectively.

Figure 22: Likelihood of contacting water/sewerage company if worried about a bill



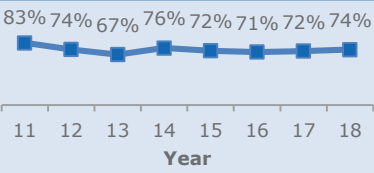
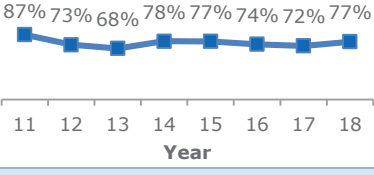
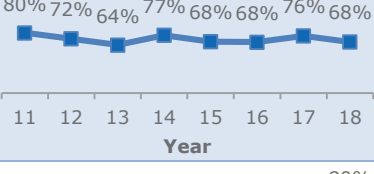
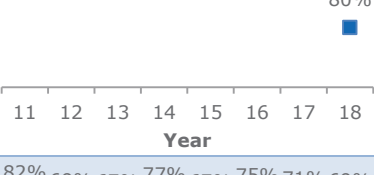
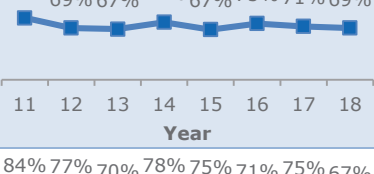
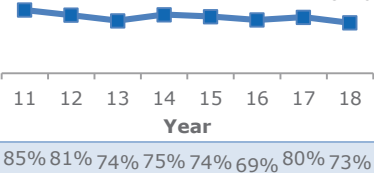
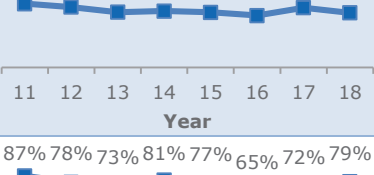
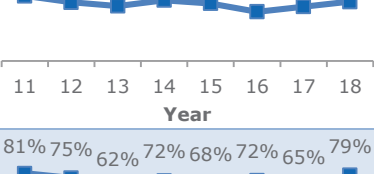
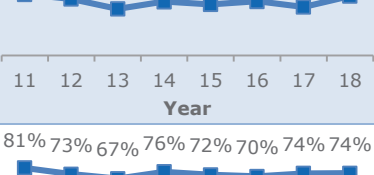
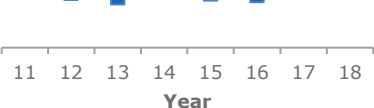
Significant difference between England and Wales 2018



Significant difference between 2017-2018 data

Table 28: Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

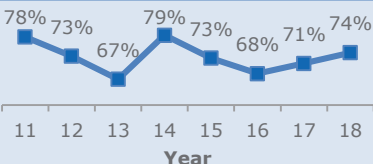
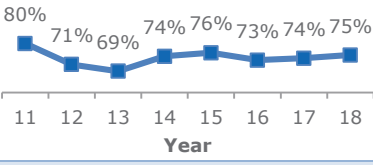
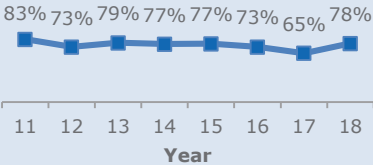
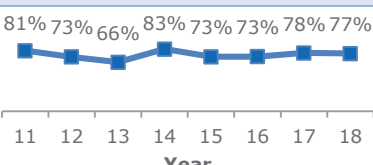
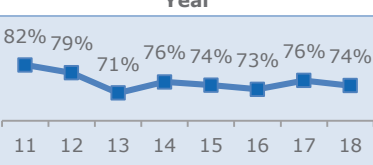
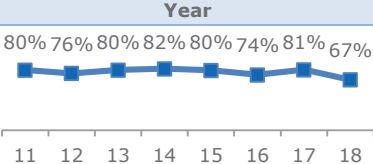
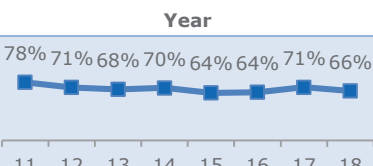
| Likely to contact if worried about bill | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year | | | | | | | | | | | | | | | | | | |
|---|------------------------------------|---|------|------|------|------|------|------|-----|------------------|---------------------------------|------------------------|------|------|------|------|------|------|------------|-----|-----|-----|-----|-----|-----|-----|-----|---|-----|----|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | | | | | | | | | | | | | | | | | | | |
| Industry (2018 base sample: 5158) | 73.7% | <table><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr></thead><tbody><tr><td>Percentage</td><td>82%</td><td>74%</td><td>68%</td><td>76%</td><td>73%</td><td>71%</td><td>73%</td><td>74%</td></tr></tbody></table> | | | | | | | | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 82% | 74% | 68% | 76% | 73% | 71% | 73% | 74% | ↓ | n/a | 1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | | | | | | | | |
| Percentage | 82% | 74% | 68% | 76% | 73% | 71% | 73% | 74% | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|--|-------|---|-----|-----|-----|
| Total WaSCs (2018 base sample: 3202) | 73.7% |  <p>83% 74% 67% 76% 72% 71% 72% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | 74% | 2% |
| Anglian Water (2018 base sample: 400) | 75.6% |  <p>87% 73% 68% 78% 77% 74% 72% 77%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 5% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 71.7% |  <p>80% 72% 64% 77% 68% 68% 76% 68%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↓ | -8% |
| Hafren Dyfrdwy (2018 base sample: 201) | 79.8% |  <p>80%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 72.1% |  <p>82% 69% 67% 77% 67% 75% 71% 69%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | -2% |
| Severn Trent Water (2018 base sample: 200) | 74.6% |  <p>84% 77% 70% 78% 75% 71% 75% 67%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↓ | -8% |
| South West Water (2018 base sample: 200) | 76.3% |  <p>85% 81% 74% 75% 74% 69% 80% 73%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | -6% |
| Southern Water (2018 base sample: 200) | 76.5% |  <p>87% 78% 73% 81% 77% 65% 72% 79%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↓ | ↔ | 7% |
| Thames Water (2018 base sample: 200) | 71.6% |  <p>81% 75% 62% 72% 68% 72% 65% 79%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 14% |
| United Utilities (2018 base sample: 400) | 73.2% |  <p>81% 73% 67% 76% 72% 70% 74% 74%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |

| | | | | | |
|--|-------|--|---|---|----|
| Wessex Water (2018 base sample: 200) | 75.9% | | ↓ | ↔ | 3% |
| Yorkshire Water (2018 base sample: 400) | 74.0% | | ↔ | ↔ | 4% |

Table 29: Likelihood of contacting water company if worried about a bill – WoCs

| Likely to contact if worried about bill | Eight- year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight- year trend | Company average vs WoC average | Change since last year |
|---|---|---|-------------------------|---|------------------------------|
| Industry (2018 base sample: 5158) | 73.7% | | ↓ | n/a | 1% |
| Total WoCs (2018 base sample: 1956) | 73.8% | | ↓ | 72% | -2% |
| Affinity Water Central (2018 base sample: 150) | 71.2% | | ↔ | ↔ | -4% |
| Affinity Water East (2018 base sample: 151) | 74.2% | | ↔ | ↔ | -2% |
| Affinity Water Southeast (2018 base sample: 150) | 74.4% | | ↓ | ↔ | -6% |
| Bournemouth Water (2018 base sample: 150) | 75.5% | | ↔ | ↔ | 4% |
| Bristol Water (2018 base sample: 300) | 73.8% | | ↓ | ↔ | 3% |

| | | | | | |
|--|-------|---|---|---|------|
| Cambridge Water (2018 base sample: 150) | 72.9% |  <p>Year</p> | ↓ | ↔ | 3% |
| Essex & Suffolk Water (2018 base sample: 152) | 73.9% |  <p>Year</p> | ↔ | ↔ | 2% |
| Hartlepool Water (2018 base sample: 150) | 75.7% |  <p>Year</p> | ↓ | ↔ | 12% |
| Portsmouth Water (2018 base sample: 150) | 75.2% |  <p>Year</p> | ↔ | ↔ | -1% |
| South East Water (2018 base sample: 150) | 75.7% |  <p>Year</p> | ↓ | ↔ | -2% |
| South Staffs Water (2018 base sample: 153) | 77.3% |  <p>Year</p> | ↔ | ↔ | -14% |
| SES Water (2018 base sample: 150) | 69.0% |  <p>Year</p> | ↓ | ↔ | -5% |

4.2 Prevalence of customers contacting their water company

Respondents are asked whether or not they had contacted their water/sewerage company in the last 12 months. Figure 23 shows contact trends for England and Wales and for each nation. This is followed by contact trends for each WaSC in Table 30, and for each WoC in Table 31.

Figure 23: Contact with the water/sewerage company

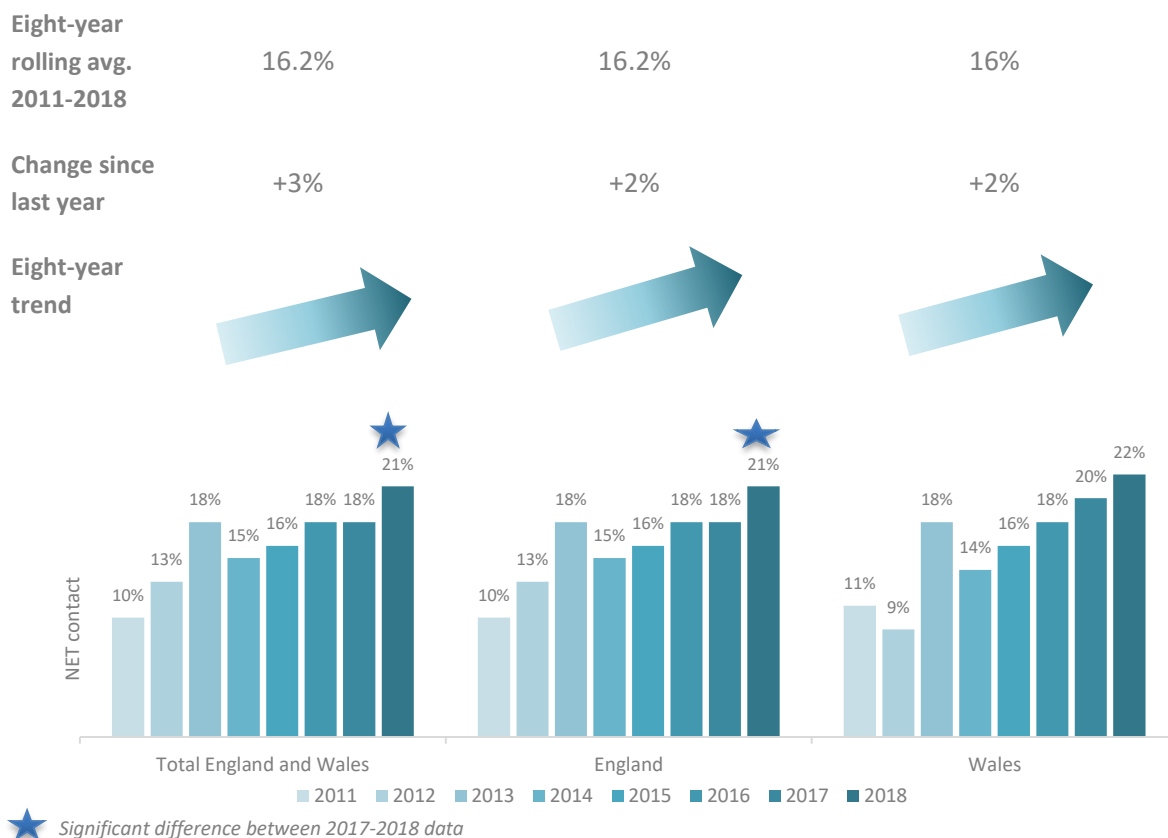


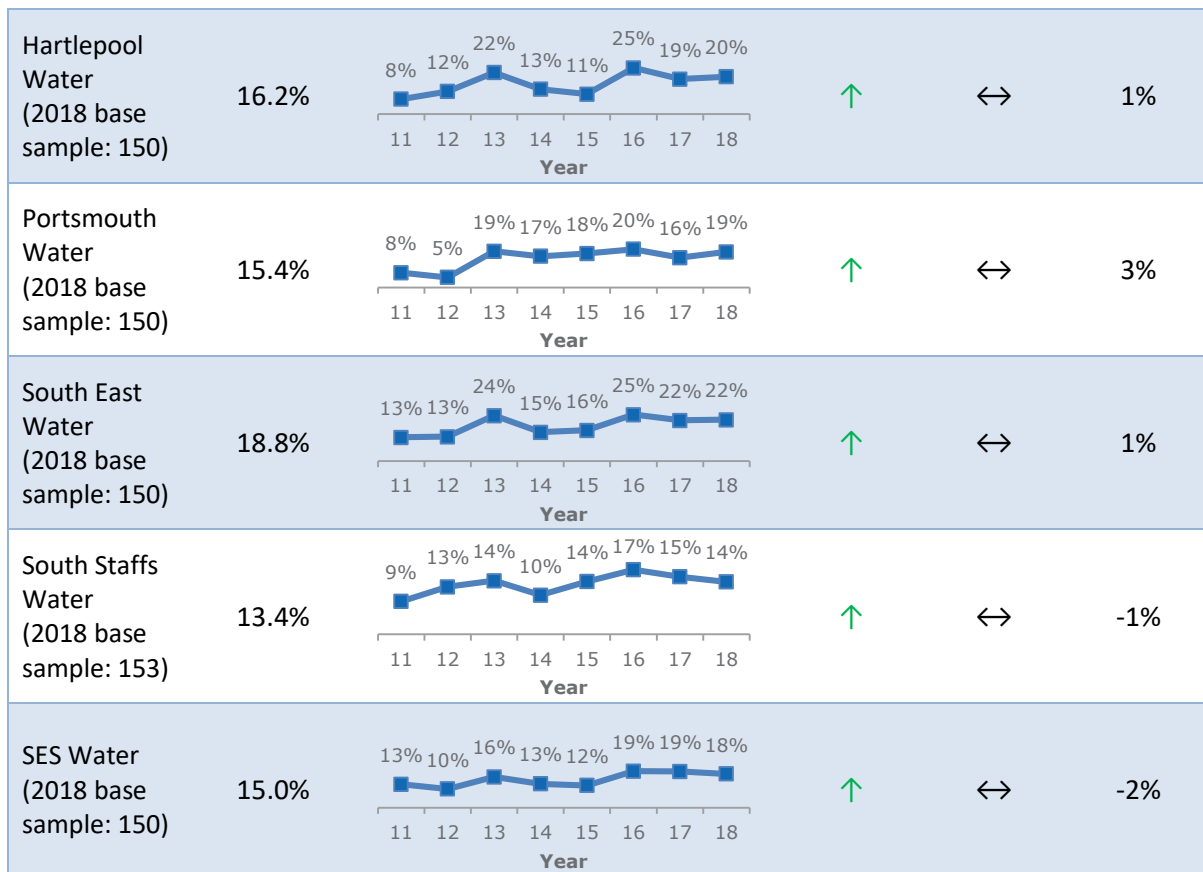
Table 30: Contact with the water/sewerage company - WaSCs

| Contact with your water and/or sewerage company | Eight-year rolling company average | Eight-year company trend | Eight-year trend | Company average vs WaSC average | Change since last year |
|---|------------------------------------|---------------------------------|------------------|---------------------------------|------------------------|
| | | '11 '12 '13 '14 '15 '16 '17 '18 | | | |
| Industry (2018 base sample: 5158) | 16.2% | 10% 13% 18% 15% 16% 18% 18% 21% | ↑ | n/a | 3% |
| Total WaSCs (2018 base sample: 3202) | 16.2% | 10% 13% 17% 15% 17% 18% 18% 22% | ↑ | 22% | 4% |
| Anglian Water (2018 base sample: 400) | 19.0% | 16% 17% 23% 17% 22% 18% 18% 21% | ↑ | ↔ | 3% |

| | | | | | |
|--|-------|--|-----|---|-----|
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 15.8% | | ↑ | ↔ | 2% |
| Hafren Dyfrdwy (2018 base sample: 201) | 22.9% | | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 13.5% | | ↑ | ↔ | 5% |
| Severn Trent Water (2018 base sample: 200) | 14.9% | | ↑ | ↔ | 0% |
| South West Water (2018 base sample: 200) | 20.2% | | ↑ | ↔ | 9% |
| Southern Water (2018 base sample: 200) | 18.6% | | ↑ | ↔ | 4% |
| Thames Water (2018 base sample: 200) | 16.2% | | ↑ | ↔ | 7% |
| United Utilities (2018 base sample: 400) | 14.9% | | ↑ | ↔ | 5% |
| Wessex Water (2018 base sample: 200) | 16.4% | | ↑ | ↔ | 10% |
| Yorkshire Water (2018 base sample: 400) | 17.0% | | ↑ | ↔ | 2% |

Table 31: Contact with the water company – WoCs

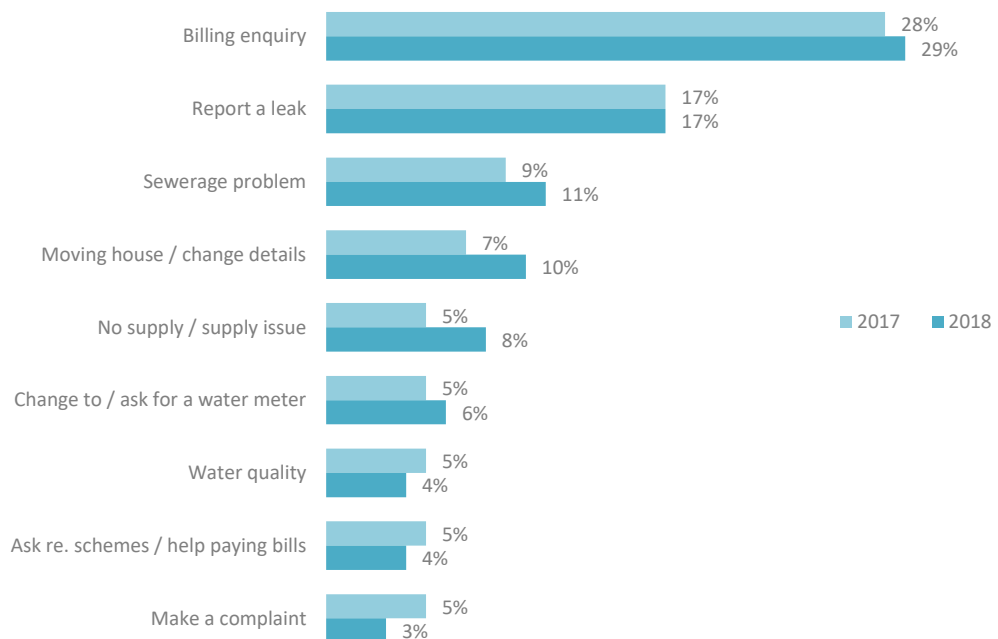
| Contact with your water and/or sewerage company | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|--------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 16.2% | 10% | 13% | 18% | 15% | 16% | 18% | 18% | 21% | ↑ | n/a | 3% |
| Total WoCs (2018 base sample: 1956) | 15.9% | 9% | 13% | 19% | 15% | 15% | 19% | 18% | 19% | ↑ | 19% | 1% |
| Affinity Water Central (2018 base sample: 150) | 15.2% | 6% | 17% | 20% | 15% | 13% | 17% | 16% | 17% | ↑ | ↔ | 2% |
| Affinity Water East (2018 base sample: 151) | 15.8% | 11% | 18% | 19% | 11% | 16% | 19% | 14% | 21% | ↑ | ↔ | 7% |
| Affinity Water Southeast (2018 base sample: 150) | 19.2% | 13% | 13% | 25% | 19% | 21% | 17% | 26% | 19% | ↑ | ↔ | -6% |
| Bournemouth Water (2018 base sample: 150) | 15.2% | 9% | 11% | 16% | 15% | 16% | 15% | 17% | 24% | ↑ | ↔ | 7% |
| Bristol Water (2018 base sample: 300) | 15.1% | 10% | 9% | 19% | 13% | 17% | 17% | 20% | 15% | ↑ | ↔ | -5% |
| Cambridge Water (2018 base sample: 150) | 16.5% | 9% | 13% | 21% | 19% | 10% | 18% | 20% | 21% | ↑ | ↔ | 2% |
| Essex & Suffolk Water (2018 base sample: 152) | 15.7% | 10% | 13% | 18% | 17% | 15% | 16% | 19% | 19% | ↑ | ↔ | 1% |



4.3 Reason for making contact with the water company

Those who had contacted their water company in the last 12 months were asked what their reason for contact was.

Figure 24: Reason for contact



Footnote: Reasons for contact which are below 5% for both years are not shown.

4.4 Satisfaction with different aspects of contact

Respondents who made contact in the last 12 months were asked to rate their satisfaction with five different aspects of contact handling – ease of contact, quality of information, knowledge of staff, the feeling that the contact would be resolved and how well the company kept them informed of progress. Figure 25 and Figure 26 show national trends for the last eight-years for each aspect of contact. This is followed by Figure 27 which compares 2018 satisfaction between England and Wales, Table 32 and Table 33 which show 2018 satisfaction with aspects of service for each WaSC and each WoC respectively, and Table 34 and Table 35 which highlight the eight-year trends by WaSC and by WoC.

Figure 25: Satisfaction with aspects of contact

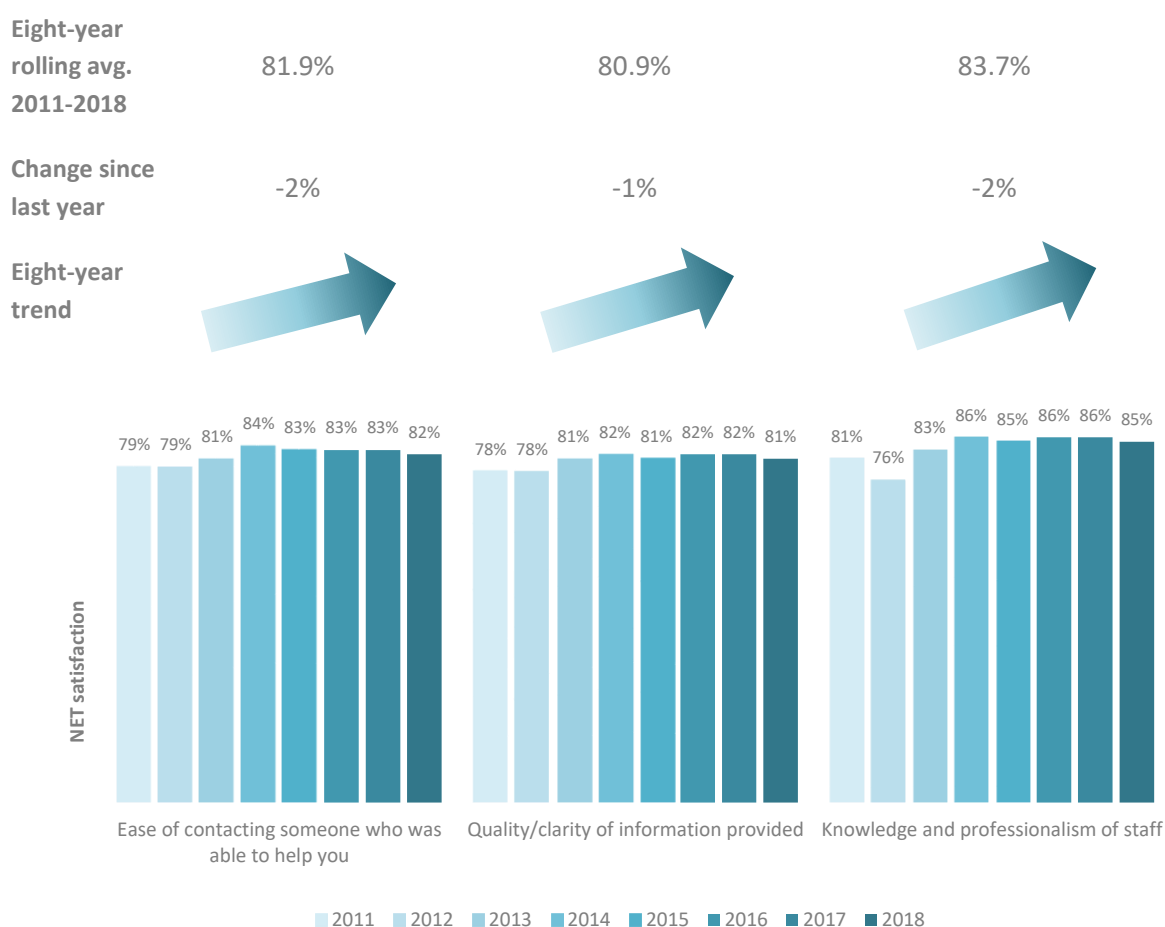


Figure 26: Satisfaction with aspects of contact

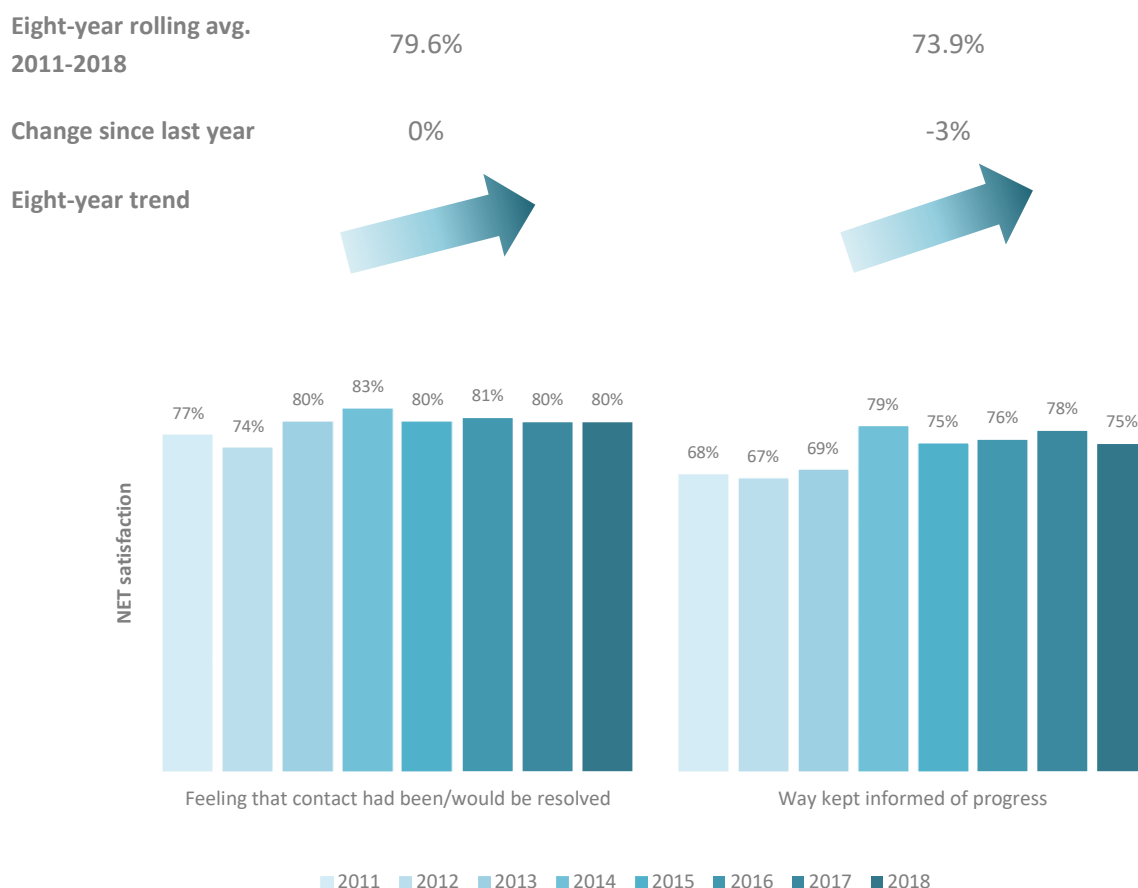
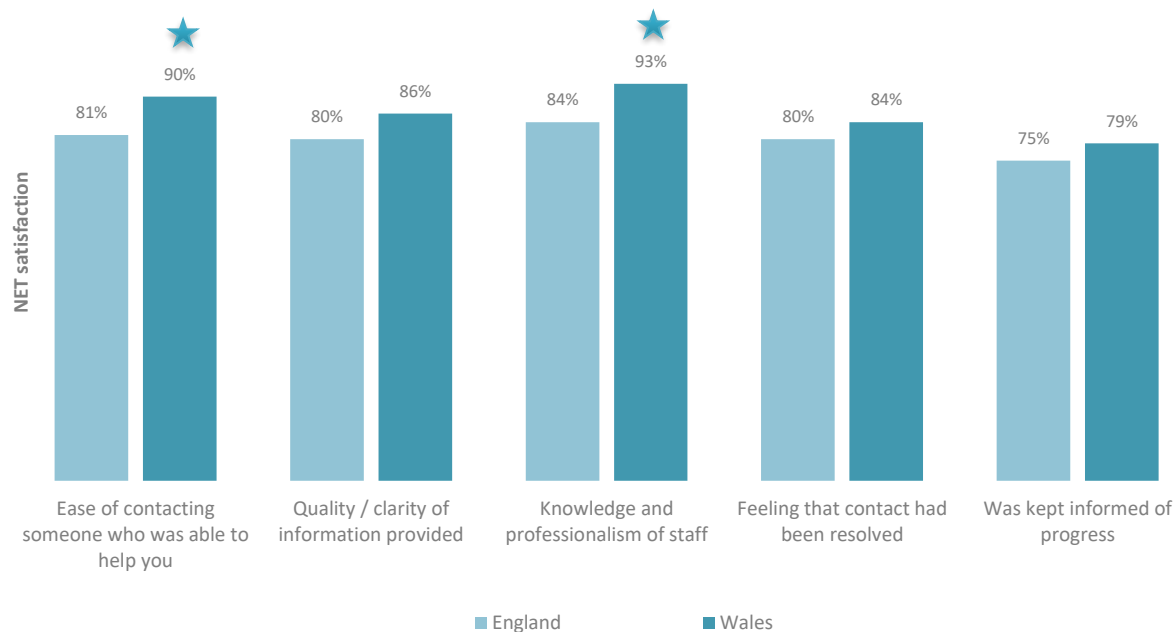


Figure 27: Satisfaction with aspects of contact by nation.



★ Significant difference between England and Wales 2018

Table 32: Satisfaction with aspects of contact in 2018– WaSCs

| Satisfaction with aspects of contact (2018 data only) | Ease of contacting someone who was able to help you | Quality / clarity of information provided | Knowledge and professionalism of staff | Feeling that contact had been / would be resolved | Was kept informed of progress |
|---|---|---|--|---|-------------------------------|
| Industry (2018 base sample: 5158) | 82% | 81% | 85% | 80% | 75% |
| Total WaSCs (2018 base sample: 3202) | 82% | 81% | 85% | 81% | 75% |
| Anglian Water (2018 base sample: 400) | 88% | 85% | 86% | 82% | 74% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 91% | 86% | 94% | 84% | 80% |
| Hafren Dyfrdwy (2018 base sample: 201) | 82% | 77% | 82% | 82% | 70% |
| Northumbrian Water (2018 base sample: 400) | 82% | 92% | 95% | 86% | 79% |
| Severn Trent Water (2018 base sample: 200) | 85% | 88% | 92% | 85% | 83% |
| South West Water (2018 base sample: 200) | 80% | 78% | 94% | 83% | 73% |
| Southern Water (2018 base sample: 200) | 75% | 78% | 82% | 74% | 65% |
| Thames Water (2018 base sample: 200) | 67% | 67% | 76% | 75% | 62% |
| United Utilities (2018 base sample: 400) | 91% | 86% | 82% | 81% | 85% |
| Wessex Water (2018 base sample: 200) | 89% | 84% | 86% | 86% | 79% |
| Yorkshire Water (2018 base sample: 400) | 86% | 84% | 85% | 82% | 77% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 33: Satisfaction with aspects of contact 2018 – WoCs

| Satisfaction with aspects of contact (2018 data only) | Ease of contacting someone who was able to help you | Quality / clarity of information provided | Knowledge and professionalism of staff | Feeling that contact had been / would be resolved | Was kept informed of progress |
|---|---|---|--|---|-------------------------------|
| Industry (2018 base sample: 5158) | 82% | 81% | 85% | 80% | 75% |
| Total WoCs (2018 base sample: 1956) | 80% | 79% | 81% | 78% | 73% |
| Affinity Water Central (2018 base sample: 150) | 68% | 76% | 88% | 83% | 62% |
| Affinity Water East (2018 base sample: 151) | 80% | 77% | 83% | 73% | 71% |
| Affinity Water Southeast (2018 base sample: 150) | 82% | 89% | 86% | 69% | 78% |
| Bournemouth Water (2018 base sample: 150) | 78% | 78% | 82% | 78% | 57% |
| Bristol Water (2018 base sample: 300) | 83% | 85% | 90% | 83% | 85% |
| Cambridge Water (2018 base sample: 150) | 88% | 90% | 91% | 90% | 83% |
| Essex & Suffolk Water (2018 base sample: 152) | 86% | 82% | 83% | 86% | 78% |
| Hartlepool Water (2018 base sample: 150) | 97% | 97% | 100% | 93% | 86% |
| Portsmouth Water (2018 base sample: 150) | 89% | 86% | 85% | 89% | 75% |
| South East Water (2018 base sample: 150) | 83% | 72% | 67% | 62% | 76% |
| South Staffs Water | 76% | 75% | 81% | 71% | 76% |

| | | | | | |
|-----------------------------------|-----|-----|-----|-----|-----|
| (2018 base sample: 153) | | | | | |
| SES Water (2018 base sample: 150) | 92% | 80% | 80% | 84% | 74% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 34: Satisfaction with aspects of contact – WaSC eight-year trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of contact (Eight-year trend arrow) | Ease of contacting someone who was able to help you | Quality / clarity of information provided | Knowledge and professionalism of staff | Feeling that contact had been / would be resolved | Was kept informed of progress |
|---|---|---|--|---|-------------------------------|
| Industry (2018 base sample: 5158) | ↑ 81.9% | ↑ 80.9% | ↑ 83.7% | ↑ 79.6% | ↑ 73.9% |
| Total WaSCs (2018 base sample: 3202) | ↑ 81.4% | ↑ 80.9% | ↑ 83.5% | ↑ 79.5% | ↑ 73.8% |
| Anglian Water (2018 base sample: 400) | ↑ 81.1% | ↑ 82.3% | ↑ 83.9% | ↑ 80.7% | ↑ 71.6% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | ↓ 89.4% | ↔ 84.9% | ↔ 87.3% | ↔ 84.9% | ↑ 78.1% |
| Northumbrian Water (2018 base sample: 400) | ↔ 84.7% | ↔ 85.8% | ↔ 89.7% | ↔ 82.9% | ↔ 71.9% |
| Severn Trent Water (2018 base sample: 200) | ↑ 85.6% | ↑ 85.3% | ↑ 88.8% | ↔ 81.6% | ↑ 76.7% |
| South West Water (2018 base sample: 200) | ↑ 82.1% | ↑ 79.2% | ↑ 85.1% | ↑ 80.1% | ↑ 72.9% |
| Southern Water (2018 base sample: 200) | ↔ 77.2% | ↓ 74.1% | ↔ 77.1% | ↓ 73.1% | ↓ 64.1% |
| Thames Water (2018 base sample: 200) | ↓ 73.7% | ↔ 72.5% | ↔ 76.3% | ↔ 74.7% | ↔ 68.5% |
| United Utilities (2018 base sample: 400) | ↑ 78.9% | ↑ 81.7% | ↑ 81.3% | ↑ 78.4% | ↑ 75.9% |
| Wessex Water (2018 base sample: 200) | ↔ 89.3% | ↔ 85.0% | ↔ 88.9% | ↔ 85.9% | ↔ 82.1% |

| | | | | | |
|--|---------|---------|---------|---------|---------|
| Yorkshire Water (2018 base sample: 400) | ↓ 85.4% | ↔ 85.0% | ↔ 86.5% | ↔ 81.9% | ↔ 79.1% |
|--|---------|---------|---------|---------|---------|

Table 35: Satisfaction with aspects of contact – WoC eight-year trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of contact (Eight-year trend arrow) | Ease of contacting someone who was able to help you | Quality / clarity of information provided | Knowledge and professionalism of staff | Feeling that contact had been / would be resolved | Was kept informed of progress |
|---|---|---|--|---|-------------------------------|
| Industry (2018 base sample: 5158) | ↑ 81.9% | ↑ 80.9% | ↑ 83.7% | ↑ 79.6% | ↑ 73.9% |
| Total WoCs (2018 base sample: 1956) | ↔ 83.6% | ↑ 80.8% | ↔ 84.5% | ↔ 79.8% | ↔ 74.4% |
| Affinity Water Central (2018 base sample: 150) | ↓ 82.7% | ↔ 78.5% | ↔ 84.7% | ↔ 79.5% | ↔ 71.9% |
| Affinity Water East (2018 base sample: 151) | ↔ 83.4% | ↔ 77.9% | ↑ 82.5% | ↔ 78.5% | ↑ 75.4% |
| Affinity Water Southeast (2018 base sample: 150) | ↔ 76.7% | ↔ 74.5% | ↔ 80.0% | ↔ 69.6% | ↔ 70.6% |
| Bournemouth Water (2018 base sample: 150) | ↓ 87.5% | ↓ 85.4% | ↓ 87.1% | ↓ 81.2% | ↔ 74.9% |
| Bristol Water (2018 base sample: 300) | ↓ 85.4% | ↔ 84.5% | ↔ 87.6% | ↔ 80.6% | ↑ 76.7% |
| Cambridge Water (2018 base sample: 150) | ↔ 83.7% | ↔ 82.8% | ↓ 85.8% | ↔ 82.3% | ↔ 77.7% |
| Essex & Suffolk Water (2018 base sample: 152) | ↑ 85.5% | ↑ 84.7% | ↔ 87.3% | ↑ 83.3% | ↔ 79.8% |
| Hartlepool Water (2018 base sample: 150) | ↔ 89.9% | ↔ 92.1% | ↔ 92.6% | ↔ 92.1% | ↓ 84.4% |
| Portsmouth Water (2018 base sample: 150) | ↔ 86.7% | ↔ 84.8% | ↔ 87.3% | ↔ 88.0% | ↓ 80.6% |

| | | | | | |
|---|---------|---------|---------|---------|---------|
| South East Water (2018 base sample: 150) | ↔ 80.2% | ↑ 75.9% | ↔ 78.6% | ↔ 73.6% | ↑ 67.8% |
| South Staffs Water (2018 base sample: 153) | ↔ 84.8% | ↔ 83.5% | ↓ 86.7% | ↔ 81.0% | ↔ 78.3% |
| SES Water (2018 base sample: 150) | ↑ 84.1% | ↑ 80.1% | ↔ 81.9% | ↔ 81.4% | ↔ 74.7% |

4.5 Overall satisfaction with water company contact handling

After rating their satisfaction across the aspects of contact handling, respondents were asked how satisfied they were overall with the way their water company dealt with their contact.

Figure 28 shows the eight-year trend for overall satisfaction with contact for England and Wales and for each nation. This is followed by Table 36 and Table 37 which show satisfaction by each WaSC and each WoC in turn.

Figure 28: Overall satisfaction with water company contact handling

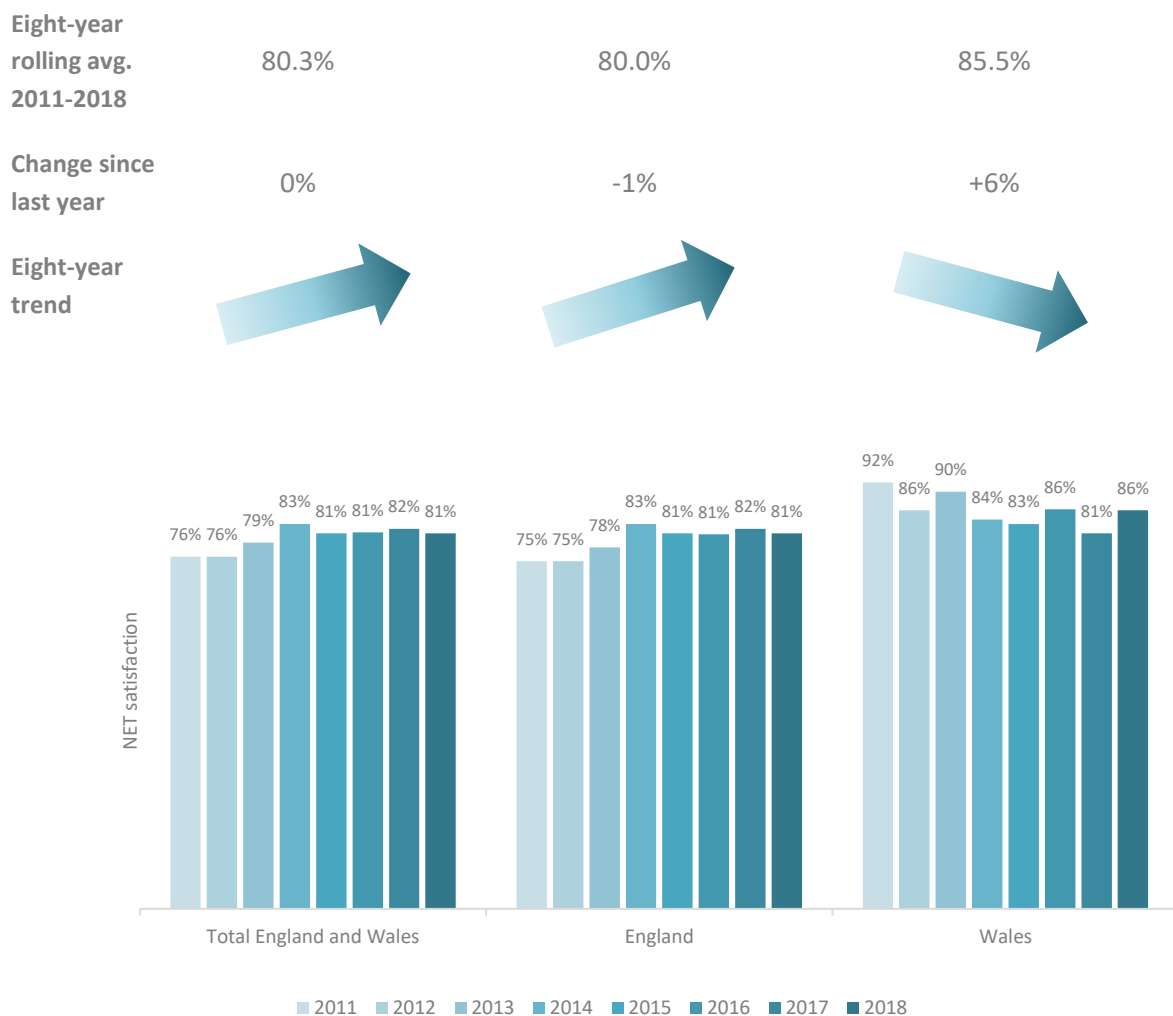


Table 36: Overall satisfaction with water company contact handling – WaSCs

| Satisfaction with contact handling | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|---|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 80.3% | 76% | 76% | 79% | 83% | 81% | 81% | 82% | 81% | ↑ | n/a | 0% |
| Total WaSCs (2018 base sample: 3202) | 80.2% | 75% | 76% | 78% | 85% | 80% | 81% | 81% | 82% | ↑ | 82% | 1% |
| Anglian Water (2018 base sample: 400) | 82.6% | 67% | 81% | 80% | 87% | 85% | 83% | 90% | 84% | ↑ | ↔ | -6% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 85.8% | 94% | 87% | 91% | 83% | 83% | 85% | 80% | 87% | ↓ | ↔ | 7% |
| Hafren Dyfrdwy (2018 base sample: 201) | 72.7% | | | | | | | | 73% | n/a | ↔ | n/a |
| Northumbrian Water (2018 base sample: 400) | 84.7% | 100% | 74% | 84% | 82% | 86% | 87% | 81% | 88% | ↓ | ↔ | 7% |
| Severn Trent Water (2018 base sample: 200) | 83.1% | 71% | 73% | 86% | 88% | 82% | 91% | 77% | 88% | ↑ | ↔ | 11% |
| South West Water (2018 base sample: 200) | 77.6% | 52% | 70% | 80% | 82% | 78% | 85% | 81% | 77% | ↑ | ↔ | -4% |
| Southern Water (2018 base sample: 200) | 71.3% | 74% | 75% | 71% | 69% | 66% | 71% | 70% | 77% | ↔ | ↔ | +7% |

| | | | | | |
|--|-------|--|---|---|-----|
| Thames Water (2018 base sample: 200) | 73.2% | <p>71% 76% 60% 83% 74% 69% 80% 73%</p> <p>Year</p> | ↔ | ↔ | -7% |
| United Utilities (2018 base sample: 400) | 80.3% | <p>73% 77% 77% 84% 73% 85% 83% 85%</p> <p>Year</p> | ↑ | ↔ | +2% |
| Wessex Water (2018 base sample: 200) | 86.6% | <p>93% 80% 83% 96% 86% 86% 89% 84%</p> <p>Year</p> | ↔ | ↔ | -4% |
| Yorkshire Water (2018 base sample: 400) | 84.3% | <p>88% 75% 85% 92% 93% 79% 85% 82%</p> <p>Year</p> | ↔ | ↔ | -3% |

Table 37: Overall satisfaction with water company contact handling – WoCs

| Satisfaction with contact handling | Eight- year rolling company average | Eight-year company trend | | | | | | | | Eight- year trend | Company average vs WoC average | Change since last year |
|---|---|--------------------------|-----|-----|-----|-----|-----|-----|-----|-------------------------|---|------------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 80.3% | 76% | 76% | 79% | 83% | 81% | 81% | 82% | 81% | ↑ | n/a | 0% |
| Total WoCs (2018 base sample: 1956) | 80.6% | 79% | 73% | 82% | 75% | 85% | 82% | 84% | 79% | ↑ | 79% | -5% |
| Affinity Water Central (2018 base sample: 150) | 79.4% | 73% | 79% | 93% | 73% | 83% | 77% | 79% | 72% | ↔ | ↔ | -6% |
| Affinity Water East (2018 base sample: 151) | 79.5% | 82% | 67% | 79% | 87% | 87% | 79% | 90% | 73% | ↔ | ↔ | -17% |
| Affinity Water Southeast (2018 base sample: 150) | 73.2% | 65% | 79% | 74% | 71% | 68% | 77% | 68% | 86% | ↔ | ↔ | +17% |

| Bournemouth Water (2018 base sample: 150) | 83.5% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>91%</td><td>75%</td><td>96%</td><td>86%</td><td>84%</td><td>95%</td><td>76%</td><td>72%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 91% | 75% | 96% | 86% | 84% | 95% | 76% | 72% | ↔ | ↔ | -4% |
|--|-------|---|------|------|------|------|------|------|------|------|------|------------|------|-----|-----|-----|------|-----|-----|-----|---|---|------|
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 91% | 75% | 96% | 86% | 84% | 95% | 76% | 72% | | | | | | | | | | | | | | | |
| Bristol Water (2018 base sample: 300) | 83.5% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>79%</td><td>57%</td><td>88%</td><td>77%</td><td>92%</td><td>84%</td><td>86%</td><td>90%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 79% | 57% | 88% | 77% | 92% | 84% | 86% | 90% | ↑ | ↔ | +4% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 79% | 57% | 88% | 77% | 92% | 84% | 86% | 90% | | | | | | | | | | | | | | | |
| Cambridge Water (2018 base sample: 150) | 82.8% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>100%</td><td>74%</td><td>77%</td><td>86%</td><td>100%</td><td>75%</td><td>73%</td><td>91%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 100% | 74% | 77% | 86% | 100% | 75% | 73% | 91% | ↔ | ↔ | +17% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 100% | 74% | 77% | 86% | 100% | 75% | 73% | 91% | | | | | | | | | | | | | | | |
| Essex & Suffolk Water (2018 base sample: 152) | 82.0% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>77%</td><td>72%</td><td>82%</td><td>68%</td><td>91%</td><td>79%</td><td>91%</td><td>90%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 77% | 72% | 82% | 68% | 91% | 79% | 91% | 90% | ↑ | ↔ | -1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 77% | 72% | 82% | 68% | 91% | 79% | 91% | 90% | | | | | | | | | | | | | | | |
| Hartlepool Water (2018 base sample: 150) | 92.1% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>100%</td><td>94%</td><td>95%</td><td>94%</td><td>92%</td><td>86%</td><td>87%</td><td></td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 100% | 94% | 95% | 94% | 92% | 86% | 87% | | ↓ | ↔ | +1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 100% | 94% | 95% | 94% | 92% | 86% | 87% | | | | | | | | | | | | | | | | |
| Portsmouth Water (2018 base sample: 150) | 85.7% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>100%</td><td>50%</td><td>90%</td><td>88%</td><td>78%</td><td>90%</td><td>88%</td><td>86%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 100% | 50% | 90% | 88% | 78% | 90% | 88% | 86% | ↔ | ↔ | -1% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 100% | 50% | 90% | 88% | 78% | 90% | 88% | 86% | | | | | | | | | | | | | | | |
| South East Water (2018 base sample: 150) | 75.5% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>76%</td><td>60%</td><td>64%</td><td>68%</td><td>83%</td><td>82%</td><td>88%</td><td>74%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 76% | 60% | 64% | 68% | 83% | 82% | 88% | 74% | ↔ | ↔ | -13% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 76% | 60% | 64% | 68% | 83% | 82% | 88% | 74% | | | | | | | | | | | | | | | |
| South Staffs Water (2018 base sample: 153) | 85.6% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>92%</td><td>83%</td><td>95%</td><td>81%</td><td>81%</td><td>85%</td><td>87%</td><td>81%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 92% | 83% | 95% | 81% | 81% | 85% | 87% | 81% | ↓ | ↔ | -6% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 92% | 83% | 95% | 81% | 81% | 85% | 87% | 81% | | | | | | | | | | | | | | | |
| SES Water (2018 base sample: 150) | 79.2% | <table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th></tr><tr><td>Percentage</td><td>65%</td><td>85%</td><td>78%</td><td>84%</td><td>94%</td><td>83%</td><td>76%</td><td>72%</td></tr></table> | Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | Percentage | 65% | 85% | 78% | 84% | 94% | 83% | 76% | 72% | ↔ | ↔ | -4% |
| Year | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | | | | | | | | | | | | | | | |
| Percentage | 65% | 85% | 78% | 84% | 94% | 83% | 76% | 72% | | | | | | | | | | | | | | | |

4.6 Satisfaction with overall customer service

This question was first included in the 2016 Water Matters survey. It aims to understand customers' overall satisfaction with the customer services in the round, asking them to consider meter readings, bill provision and frequency, payment options and any other aspect of customer service before rating their satisfaction level with their water company. Figure 29 below shows national figures for the last two years. This is followed by company level figures in Table 38 and Table 39.

Figure 29: Satisfaction with overall customer service

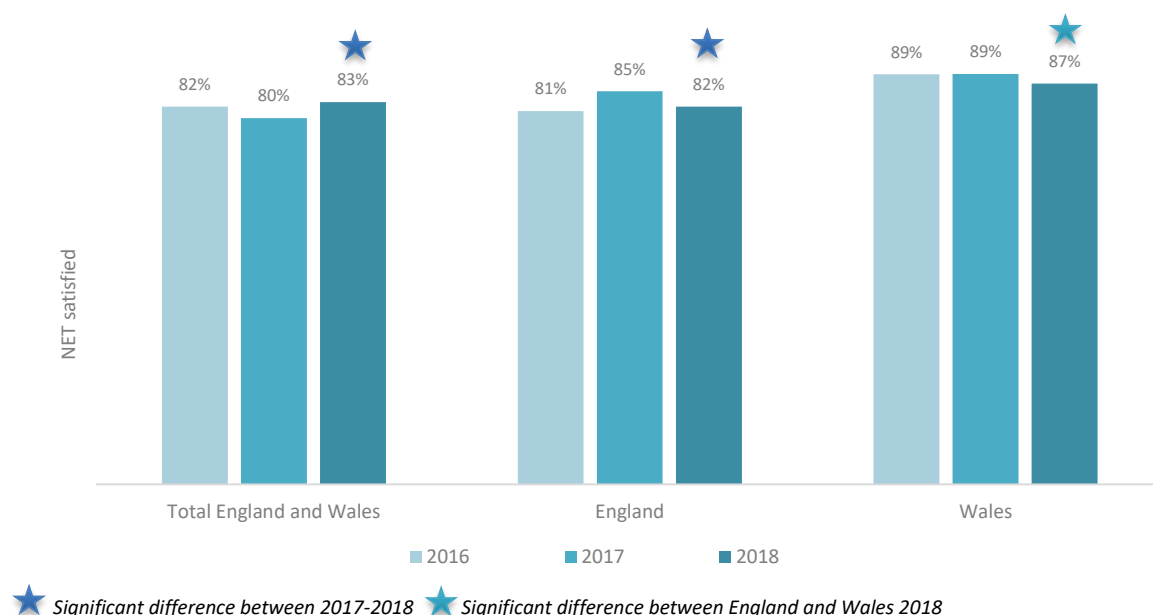


Table 38: Satisfaction with overall customer service – WaSCs

| Satisfaction with overall customer service | 2016 | 2017 | 2018 |
|---|------|------|------|
| Industry (2018 base sample: 5158) | 82% | 80% | 83% |
| Total WaSCs (2018 base sample: 3202) | 83% | 80% | 83% |
| Anglian Water (2018 base sample: 400) | 81% | 82% | 81% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 89% | 86% | 87% |
| Hafren Dyfrdwy (2018 base sample: 201) | n/a | n/a | 81% |
| Northumbrian Water (2018 base sample: 400) | 86% | 84% | 82% |
| Severn Trent Water (2018 base sample: 200) | 85% | 79% | 83% |
| South West Water (2018 base sample: 200) | 81% | 78% | 80% |
| Southern Water (2018 base sample: 200) | 78% | 76% | 81% |
| Thames Water (2018 base sample: 200) | 81% | 76% | 78% |
| United Utilities (2018 base sample: 400) | 80% | 79% | 85% |
| Wessex Water (2018 base sample: 200) | 87% | 85% | 84% |
| Yorkshire Water (2018 base sample: 400) | 85% | 80% | 86% |

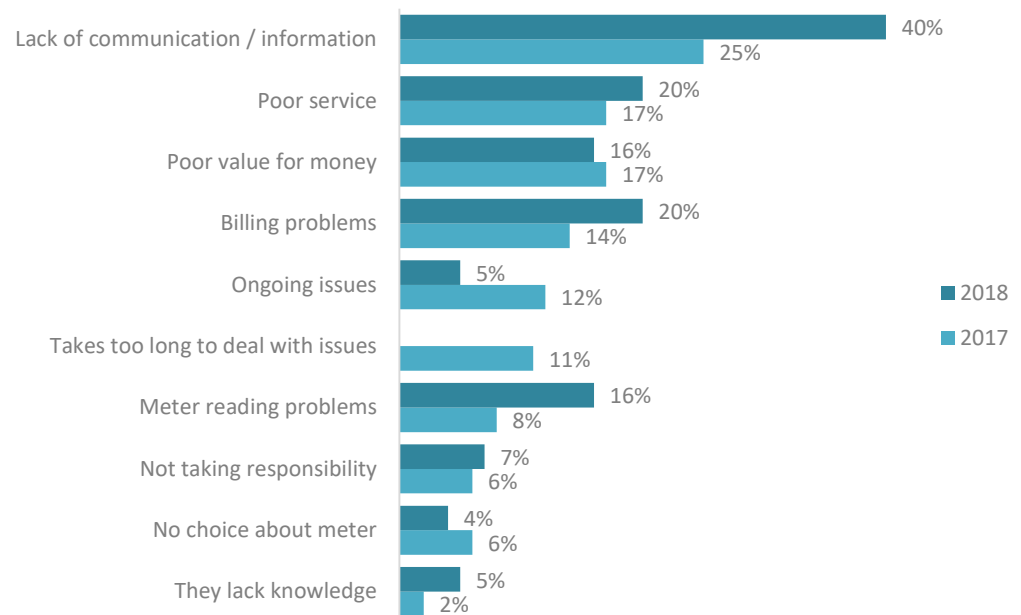
Table 39: Satisfaction with overall customer service – WoCs

| Satisfaction with overall customer service | | 2017 | 2018 |
|---|------------|------------|------------|
| Industry (2018 base sample: 5158) | 82% | 80% | 83% |
| Total WoCs (2018 base sample: 1956) | 78% | 81% | 82% |
| Affinity Water Central (2018 base sample: 150) | 72% | 77% | 79% |
| Affinity Water East (2018 base sample: 151) | 83% | 88% | 77% |
| Affinity Water Southeast (2018 base sample: 150) | 80% | 79% | 83% |
| Bournemouth Water (2018 base sample: 150) | 88% | 82% | 90% |
| Bristol Water (2018 base sample: 300) | 80% | 85% | 87% |
| Cambridge Water (2018 base sample: 150) | 83% | 81% | 83% |
| Essex & Suffolk Water (2018 base sample: 152) | 80% | 78% | 81% |
| Hartlepool Water (2018 base sample: 150) | 89% | 87% | 88% |
| Portsmouth Water (2018 base sample: 150) | 82% | 88% | 88% |
| South East Water (2018 base sample: 150) | 77% | 80% | 82% |
| South Staffs Water (2018 base sample: 153) | 81% | 85% | 83% |
| SES Water (2018 base sample: 150) | 74% | 78% | 77% |

4.7 Reasons for dissatisfaction with overall customer services

Those who are dissatisfied with the overall customer services of their water company are asked their reason for their dissatisfaction. This is shown in Figure 30 below.

Figure 30: Reasons for dissatisfaction with customer services



Footnote: Reasons for dissatisfaction which are below 5% for both 2017 and 2018 are not shown.

Chapter 5: Views on water services

This chapter covers customer satisfaction with several aspects of the water supply service (reliability, colour and appearance, safety, pressure, taste and smell, and hardness/ softness of tap water); it then presents overall satisfaction with water supply services.

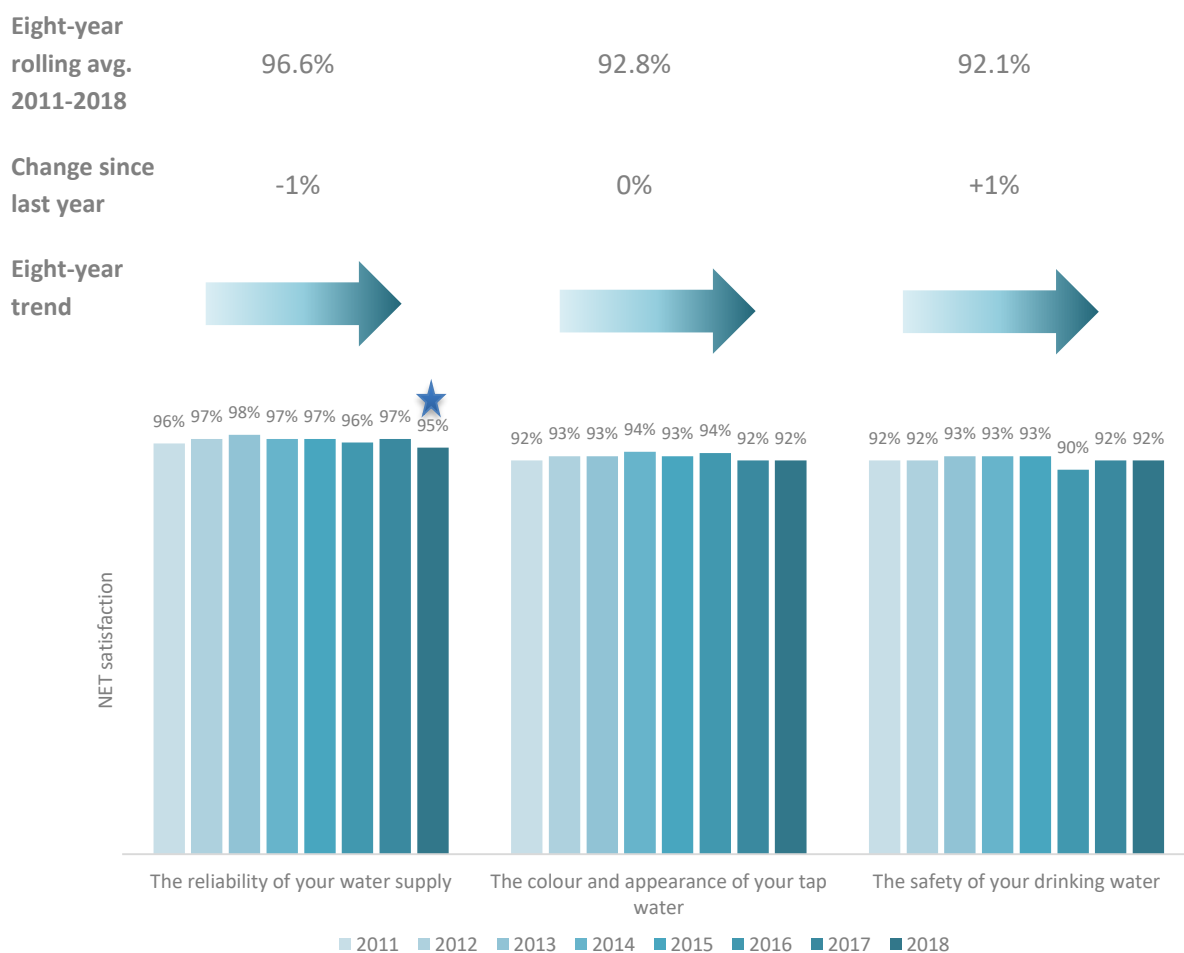
This is followed by respondents' assessment of their confidence in the long-term supply of water, that is, without being subjected to restrictions such as hose-pipe bans.

5.1 Satisfaction with aspects of water supply

Figure 31 and Figure 32 show the trends for national satisfaction with the reliability of water supplies, colour and appearance of tap water, the safety of tap water, water supply pressure, the taste and smell of tap water and the hardness/softness of tap water. This is followed by

Figure 33 which compares satisfaction between England and Wales in 2018, Table 40 and Table 41 which show satisfaction in 2018 for each WaSC and WoC respectively, and finally Table 42 and Table 43 which highlight the eight-year trends for WaSCs and WoCs.

Figure 31: Satisfaction with aspects of water supply



★ Significant difference between 2017-2018

Figure 32: Satisfaction with aspects of water supply

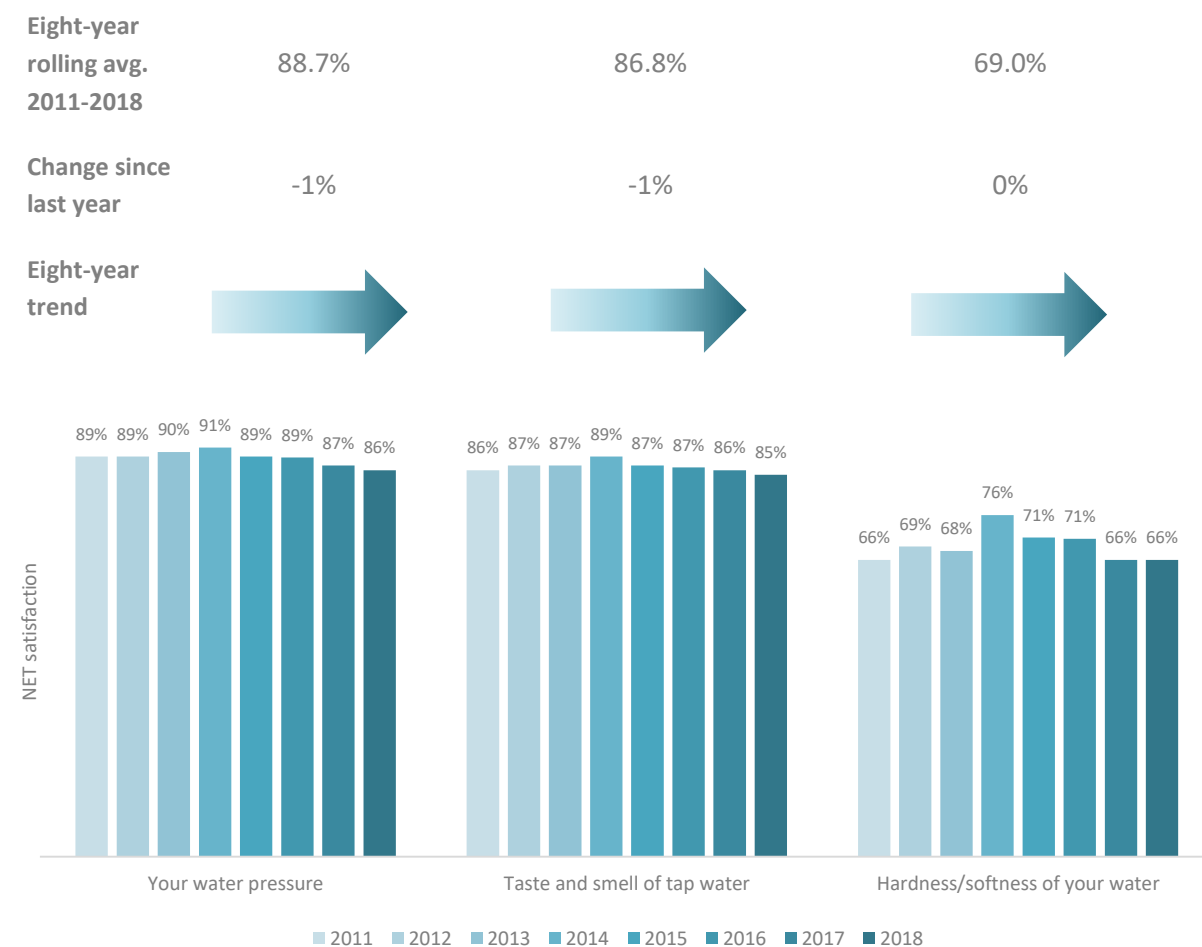
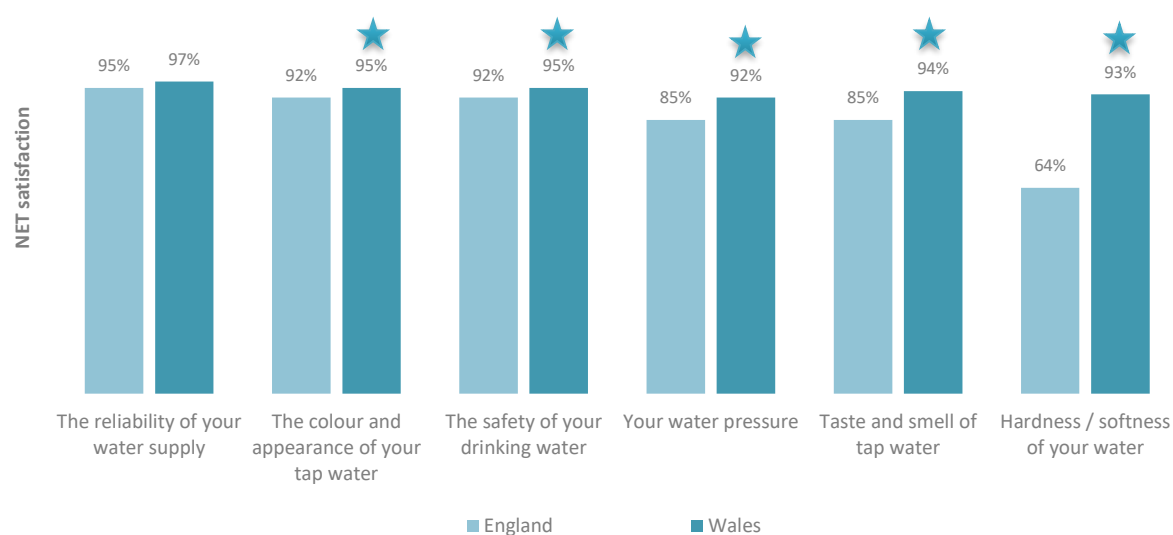


Figure 33: Satisfaction with aspects of water supply by nation



★ Significant difference between England and Wales

Table 40: Satisfaction with aspects of water supply in 2018 – WaSCs

| Satisfaction with aspects of water supply (2018 data only) | The reliability of water supply | Colour and appearance of tap water | Safety of drinking water | Water pressure | Taste and smell of tap water | Hardness / softness of water |
|--|---------------------------------|------------------------------------|--------------------------|----------------|------------------------------|------------------------------|
| Industry (2018 base sample: 5158) | 95% | 92% | 92% | 86% | 85% | 66% |
| Total WaSCs (2018 base sample: 3202) | 95% | 92% | 92% | 86% | 86% | 69% |
| Anglian Water (2018 base sample: 400) | 96% | 92% | 91% | 85% | 83% | 50% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 97% | 95% | 95% | 91% | 94% | 93% |
| Hafren Dyfrdwy (2018 base sample: 201) | 100% | 95% | 97% | 93% | 92% | 93% |
| Northumbrian Water (2018 base sample: 400) | 97% | 93% | 94% | 94% | 87% | 85% |
| Severn Trent Water (2018 base sample: 200) | 94% | 92% | 91% | 84% | 84% | 69% |
| South West Water (2018 base sample: 200) | 93% | 89% | 90% | 88% | 81% | 85% |
| Southern Water (2018 base sample: 200) | 96% | 89% | 93% | 86% | 84% | 55% |
| Thames Water (2018 base sample: 200) | 92% | 91% | 91% | 81% | 81% | 49% |
| United Utilities (2018 base sample: 400) | 95% | 92% | 92% | 84% | 89% | 85% |
| Wessex Water (2018 base sample: 200) | 98% | 92% | 95% | 91% | 86% | 55% |
| Yorkshire Water (2018 base sample: 400) | 97% | 95% | 96% | 88% | 92% | 81% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 41: Satisfaction with aspects of water supply 2018 – WoCs

| Satisfaction with aspects of water supply (2018 data only) | The reliability of water supply | Colour and appearance of tap water | Safety of drinking water | Water pressure | Taste and smell of tap water | Hardness / softness of water |
|--|---------------------------------|------------------------------------|--------------------------|----------------|------------------------------|------------------------------|
| Industry (2018 base sample: 5158) | 95% | 92% | 92% | 86% | 85% | 66% |
| Total WoCs (2018 base sample: 1956) | 96% | 92% | 92% | 87% | 83% | 55% |
| Affinity Water Central (2018 base sample: 150) | 95% | 92% | 88% | 83% | 77% | 44% |
| Affinity Water East (2018 base sample: 151) | 97% | 91% | 87% | 85% | 80% | 51% |
| Affinity Water Southeast (2018 base sample: 150) | 98% | 87% | 94% | 86% | 84% | 51% |
| Bournemouth Water (2018 base sample: 150) | 99% | 95% | 97% | 89% | 91% | 56% |
| Bristol Water (2018 base sample: 300) | 98% | 94% | 94% | 91% | 85% | 59% |
| Cambridge Water (2018 base sample: 150) | 99% | 93% | 95% | 93% | 93% | 55% |
| Essex & Suffolk Water (2018 base sample: 152) | 97% | 92% | 96% | 85% | 89% | 50% |
| Hartlepool Water (2018 base sample: 150) | 99% | 97% | 95% | 92% | 90% | 65% |
| Portsmouth Water (2018 base sample: 150) | 95% | 91% | 92% | 88% | 86% | 57% |
| South East Water (2018 base sample: 150) | 95% | 89% | 92% | 87% | 78% | 57% |

| | | | | | | |
|--|-----|-----|-----|-----|-----|-----|
| South Staffs Water (2018 base sample: 153) | 97% | 91% | 94% | 88% | 83% | 67% |
| SES Water (2018 base sample: 150) | 97% | 94% | 92% | 85% | 90% | 63% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 42: Satisfaction with aspects of water supply – WaSC eight-year trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of water supply (Eight-year trend) | The reliability of water supply | Colour and appearance of tap water | Safety of drinking water | Water pressure | Taste and smell of tap water | Hardness / softness of water |
|--|---------------------------------|------------------------------------|--------------------------|----------------|------------------------------|------------------------------|
| Industry (2018 base sample: 5158) | ↔ 96.6% | ↔ 92.8% | ↔ 92.1% | ↔ 88.7% | ↔ 86.8% | ↔ 69.0% |
| Total WaSCs (2018 base sample: 3202) | ↔ 96.6% | ↔ 93.0% | ↔ 92.4% | ↔ 88.9% | ↔ 87.2% | ↔ 72.0% |
| Anglian Water (2018 base sample: 400) | ↔ 96.6% | ↔ 93.2% | ↔ 92.3% | ↔ 88.1% | ↑ 85.4% | ↔ 55.5% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | ↔ 98.0% | ↔ 95.1% | ↑ 95.2% | ↔ 91.4% | ↑ 91.6% | ↔ 92.5% |
| Northumbrian Water (2018 base sample: 400) | ↔ 98.0% | ↔ 95.1% | ↔ 95.2% | ↔ 91.6% | ↑ 90.7% | ↔ 86.2% |
| Severn Trent Water (2018 base sample: 200) | ↔ 96.9% | ↔ 92.1% | ↔ 92.2% | ↔ 89.7% | ↔ 86.0% | ↔ 73.3% |
| South West Water (2018 base sample: 200) | ↔ 96.0% | ↔ 93.3% | ↑ 92.3% | ↔ 90.5% | ↔ 85.8% | ↔ 87.6% |
| Southern Water (2018 base sample: 200) | ↔ 96.6% | ↔ 91.7% | ↔ 92.0% | ↔ 89.2% | ↔ 85.6% | ↔ 58.2% |
| Thames Water (2018 base sample: 200) | ↓ 95.1% | ↓ 90.8% | ↓ 88.9% | ↓ 85.8% | ↓ 84.2% | ↔ 53.5% |

| | | | | | | |
|--|---------|---------|---------|---------|---------|---------|
| United Utilities (2018 base sample: 400) | ↔ 96.6% | ↔ 93.8% | ↔ 92.7% | ↔ 88.4% | ↔ 88.8% | ↔ 86.7% |
| Wessex Water (2018 base sample: 200) | ↓ 97.5% | ↔ 93.6% | ↔ 93.1% | ↔ 90.0% | ↔ 87.3% | ↔ 59.9% |
| Yorkshire Water (2018 base sample: 400) | ↔ 97.3% | ↑ 94.3% | ↔ 94.7% | ↔ 90.3% | ↔ 89.9% | ↔ 80.3% |

Table 43: Satisfaction with aspects of water supply – WoC eight-year trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of water supply (Eight-year trend) | The reliability of water supply | Colour and appearance of tap water | Safety of drinking water | Water pressure | Taste and smell of tap water | Hardness / softness of water |
|--|---------------------------------|------------------------------------|--------------------------|----------------|------------------------------|------------------------------|
| Industry (2018 base sample: 5158) | ↔ 96.6% | ↔ 92.8% | ↔ 92.1% | ↔ 88.7% | ↔ 86.8% | ↔ 69.0% |
| Total WoCs (2018 base sample: 1956) | ↔ 96.6% | ↔ 92.1% | ↔ 91.4% | ↔ 87.8% | ↔ 85.5% | ↔ 58.4% |
| Affinity Water Central (2018 base sample: 150) | ↑ 95.7% | ↑ 90.3% | ↔ 88.0% | ↔ 84.6% | ↔ 81.1% | ↔ 46.4% |
| Affinity Water East (2018 base sample: 151) | ↔ 97.1% | ↔ 92.7% | ↔ 91.6% | ↓ 84.0% | ↔ 87.9% | ↔ 54.3% |
| Affinity Water Southeast (2018 base sample: 150) | ↔ 96.7% | ↔ 89.6% | ↔ 91.9% | ↔ 88.2% | ↔ 83.9% | ↔ 54.6% |
| Bournemouth Water (2018 base sample: 150) | ↑ 97.5% | ↔ 94.9% | ↔ 95.0% | ↔ 90.2% | ↑ 90.8% | ↔ 59.9% |
| Bristol Water (2018 base sample: 300) | ↑ 96.7% | ↔ 93.3% | ↔ 92.1% | ↔ 88.8% | ↔ 87.6% | ↓ 64.2% |
| Cambridge Water (2018 base sample: 150) | ↓ 97.4% | ↔ 94.4% | ↔ 94.5% | ↔ 91.3% | ↔ 88.8% | ↑ 53.6% |
| Essex & Suffolk Water (2018 base sample: 152) | ↓ 97.2% | ↔ 92.9% | ↔ 92.0% | ↓ 88.0% | ↔ 88.6% | ↔ 55.6% |

| | | | | | | |
|---|---------|---------|---------|---------|---------|---------|
| Hartlepool Water (2018 base sample: 150) | ↔ 98.2% | ↔ 95.9% | ↔ 95.1% | ↔ 91.7% | ↔ 90.9% | ↔ 69.5% |
| Portsmouth Water (2018 base sample: 150) | ↔ 97.3% | ↑ 94.1% | ↔ 92.6% | ↔ 89.2% | ↔ 88.5% | ↔ 59.3% |
| South East Water (2018 base sample: 150) | ↔ 96.7% | ↓ 90.8% | ↔ 90.9% | ↔ 88.6% | ↔ 81.9% | ↓ 59.3% |
| South Staffs Water (2018 base sample: 153) | ↔ 96.0% | ↔ 92.1% | ↔ 93.1% | ↔ 89.0% | ↔ 86.2% | ↔ 72.6% |
| SES Water (2018 base sample: 150) | ↓ 97.5% | ↔ 94.8% | ↔ 94.4% | ↓ 89.3% | ↔ 92.3% | ↓ 68.6% |

5.2 Overall satisfaction with water supply

After rating satisfaction with different aspects of the water service, customers are asked for their overall level of satisfaction with their water supply.

Figure 34 shows eight-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by

Table **44** and

Table 45 which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 34: Overall satisfaction with water supply

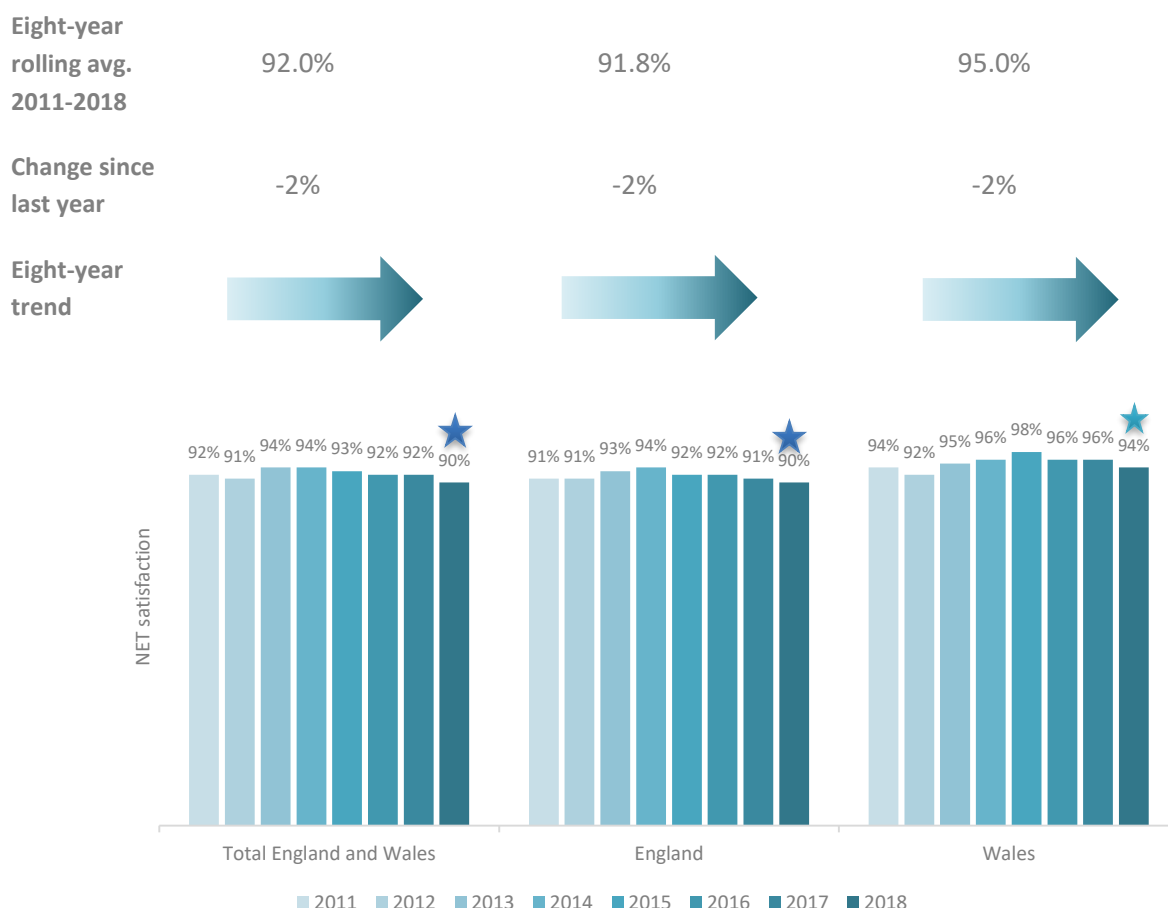


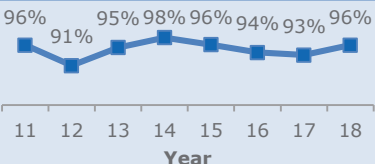
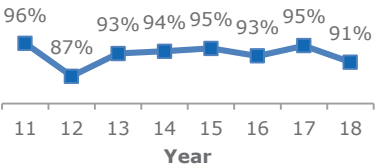
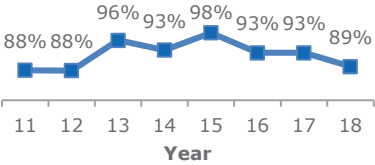
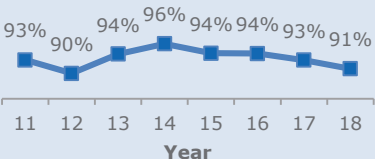
Table 44: Overall satisfaction with water supply – WaSCs

| Satisfaction with water supply | Eight-year rolling company average | Eight-year company trend | Eight-year trend | Company average vs WaSC average | Change since last year |
|---------------------------------------|------------------------------------|---------------------------------|------------------|---------------------------------|------------------------|
| | | '11 '12 '13 '14 '15 '16 '17 '18 | | | |
| Industry (2018 base sample: 5158) | 92.0% | 92% 91% 94% 94% 93% 92% 92% 90% | ↔ | n/a | -2% |
| Total WaSCs (2018 base sample: 3202) | 92.1% | 92% 91% 94% 94% 92% 93% 91% 90% | ↔ | 90% | -2% |
| Anglian Water (2018 base sample: 400) | 91.7% | 92% 92% 92% 93% 91% 92% 94% 87% | ↔ | ↔ | -6% |

| Dŵr Cymru Welsh Water (2018 base sample: 401) | 95.1% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>94%</td></tr><tr><td>12</td><td>92%</td></tr><tr><td>13</td><td>96%</td></tr><tr><td>14</td><td>95%</td></tr><tr><td>15</td><td>99%</td></tr><tr><td>16</td><td>96%</td></tr><tr><td>17</td><td>96%</td></tr><tr><td>18</td><td>94%</td></tr></table> | Year | Compliance (%) | 11 | 94% | 12 | 92% | 13 | 96% | 14 | 95% | 15 | 99% | 16 | 96% | 17 | 96% | 18 | 94% | ↔ | ↑ | -2% |
|--|----------------|--|------|----------------|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|-----|---|-----|
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 99% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| Hafren Dyfrdwy (2018 base sample: 201) | 93.0% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td></td></tr><tr><td>12</td><td></td></tr><tr><td>13</td><td></td></tr><tr><td>14</td><td></td></tr><tr><td>15</td><td></td></tr><tr><td>16</td><td></td></tr><tr><td>17</td><td></td></tr><tr><td>18</td><td>93%</td></tr></table> | Year | Compliance (%) | 11 | | 12 | | 13 | | 14 | | 15 | | 16 | | 17 | | 18 | 93% | n/a | ↔ | n/a |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| Northumbrian Water (2018 base sample: 400) | 94.6% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>94%</td></tr><tr><td>12</td><td>94%</td></tr><tr><td>13</td><td>96%</td></tr><tr><td>14</td><td>95%</td></tr><tr><td>15</td><td>94%</td></tr><tr><td>16</td><td>97%</td></tr><tr><td>17</td><td>95%</td></tr><tr><td>18</td><td>92%</td></tr></table> | Year | Compliance (%) | 11 | 94% | 12 | 94% | 13 | 96% | 14 | 95% | 15 | 94% | 16 | 97% | 17 | 95% | 18 | 92% | ↔ | ↔ | -3% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 97% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| Severn Trent Water (2018 base sample: 200) | 92.9% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>93%</td></tr><tr><td>12</td><td>90%</td></tr><tr><td>13</td><td>94%</td></tr><tr><td>14</td><td>94%</td></tr><tr><td>15</td><td>94%</td></tr><tr><td>16</td><td>95%</td></tr><tr><td>17</td><td>92%</td></tr><tr><td>18</td><td>91%</td></tr></table> | Year | Compliance (%) | 11 | 93% | 12 | 90% | 13 | 94% | 14 | 94% | 15 | 94% | 16 | 95% | 17 | 92% | 18 | 91% | ↔ | ↔ | -1% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| South West Water (2018 base sample: 200) | 91.0% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>86%</td></tr><tr><td>12</td><td>86%</td></tr><tr><td>13</td><td>92%</td></tr><tr><td>14</td><td>93%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>93%</td></tr><tr><td>17</td><td>94%</td></tr><tr><td>18</td><td>90%</td></tr></table> | Year | Compliance (%) | 11 | 86% | 12 | 86% | 13 | 92% | 14 | 93% | 15 | 93% | 16 | 93% | 17 | 94% | 18 | 90% | ↑ | ↔ | -3% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| Southern Water (2018 base sample: 200) | 89.0% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>92%</td></tr><tr><td>12</td><td>87%</td></tr><tr><td>13</td><td>91%</td></tr><tr><td>14</td><td>92%</td></tr><tr><td>15</td><td>87%</td></tr><tr><td>16</td><td>91%</td></tr><tr><td>17</td><td>86%</td></tr><tr><td>18</td><td>88%</td></tr></table> | Year | Compliance (%) | 11 | 92% | 12 | 87% | 13 | 91% | 14 | 92% | 15 | 87% | 16 | 91% | 17 | 86% | 18 | 88% | ↓ | ↔ | 2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| Thames Water (2018 base sample: 200) | 89.4% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>92%</td></tr><tr><td>13</td><td>92%</td></tr><tr><td>14</td><td>93%</td></tr><tr><td>15</td><td>89%</td></tr><tr><td>16</td><td>88%</td></tr><tr><td>17</td><td>86%</td></tr><tr><td>18</td><td>84%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | 92% | 13 | 92% | 14 | 93% | 15 | 89% | 16 | 88% | 17 | 86% | 18 | 84% | ↔ | ↓ | -2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 84% | | | | | | | | | | | | | | | | | | | | | | |
| United Utilities (2018 base sample: 400) | 92.5% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>89%</td></tr><tr><td>12</td><td>93%</td></tr><tr><td>13</td><td>95%</td></tr><tr><td>14</td><td>94%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>95%</td></tr><tr><td>17</td><td>92%</td></tr><tr><td>18</td><td>90%</td></tr></table> | Year | Compliance (%) | 11 | 89% | 12 | 93% | 13 | 95% | 14 | 94% | 15 | 92% | 16 | 95% | 17 | 92% | 18 | 90% | ↔ | ↔ | -2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| Wessex Water (2018 base sample: 200) | 92.5% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>94%</td></tr><tr><td>12</td><td>93%</td></tr><tr><td>13</td><td>93%</td></tr><tr><td>14</td><td>95%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>91%</td></tr><tr><td>17</td><td>91%</td></tr><tr><td>18</td><td>91%</td></tr></table> | Year | Compliance (%) | 11 | 94% | 12 | 93% | 13 | 93% | 14 | 95% | 15 | 93% | 16 | 91% | 17 | 91% | 18 | 91% | ↓ | ↔ | 0% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| Yorkshire Water (2018 base sample: 400) | 93.9% | <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>95%</td></tr><tr><td>12</td><td>89%</td></tr><tr><td>13</td><td>95%</td></tr><tr><td>14</td><td>96%</td></tr><tr><td>15</td><td>95%</td></tr><tr><td>16</td><td>93%</td></tr><tr><td>17</td><td>94%</td></tr><tr><td>18</td><td>95%</td></tr></table> | Year | Compliance (%) | 11 | 95% | 12 | 89% | 13 | 95% | 14 | 96% | 15 | 95% | 16 | 93% | 17 | 94% | 18 | 95% | ↔ | ↑ | 0% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 95% | | | | | | | | | | | | | | | | | | | | | | |

Table 45: Overall satisfaction with water supply – WoCs

| Satisfaction with water supply | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|--------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 92.0% | 92% | 91% | 94% | 94% | 93% | 92% | 92% | 90% | ↔ | n/a | -2% |
| Total WoCs (2018 base sample: 1956) | 91.6% | 91% | 89% | 93% | 93% | 93% | 91% | 92% | 91% | ↔ | 91% | -1% |
| Affinity Water Central (2018 base sample: 150) | 90.1% | 88% | 88% | 91% | 95% | 93% | 89% | 91% | 85% | ↔ | ↓ | -6% |
| Affinity Water East (2018 base sample: 151) | 90.6% | 92% | 84% | 89% | 97% | 92% | 91% | 91% | 90% | ↔ | ↔ | -1% |
| Affinity Water Southeast (2018 base sample: 150) | 89.9% | 89% | 91% | 89% | 91% | 88% | 91% | 87% | 91% | ↔ | ↔ | 4% |
| Bournemouth Water (2018 base sample: 150) | 93.5% | 96% | 87% | 95% | 94% | 95% | 95% | 91% | 95% | ↔ | ↑ | 5% |
| Bristol Water (2018 base sample: 300) | 93.2% | 93% | 90% | 95% | 94% | 95% | 89% | 95% | 97% | ↔ | ↑ | 2% |
| Cambridge Water (2018 base sample: 150) | 94.9% | 96% | 92% | 96% | 94% | 93% | 98% | 95% | 96% | ↔ | ↑ | 1% |
| Essex & Suffolk Water (2018 base sample: 152) | 92.2% | 93% | 91% | 95% | 91% | 92% | 93% | 89% | 91% | ↔ | ↔ | 2% |

| | | | | | |
|---|-------|--|---|---|-----|
| Hartlepool Water (2018 base sample: 150) | 94.9% |  | ↔ | ↑ | 3% |
| Portsmouth Water (2018 base sample: 150) | 93.1% |  | ↔ | ↔ | -4% |
| South East Water (2018 base sample: 150) | 90.0% |  | ↔ | ↔ | 1% |
| South Staffs Water (2018 base sample: 153) | 92.2% |  | ↔ | ↔ | -4% |
| SES Water (2018 base sample: 150) | 93.1% |  | ↔ | ↔ | -1% |

5.3 Confidence in the long-term supply of water

In 2016 a new question was added to Water Matters to find out how confident customers feel that in the longer term, their water supply will be available without restriction i.e. not subject to hosepipe bans or other restrictions on use. The findings at national level are shown in

Figure 35. This is followed by

Table **46** and

Table **47** which shows perceptions by WaSC and then by WoC.

Figure 35: Confidence in the long-term supply of water

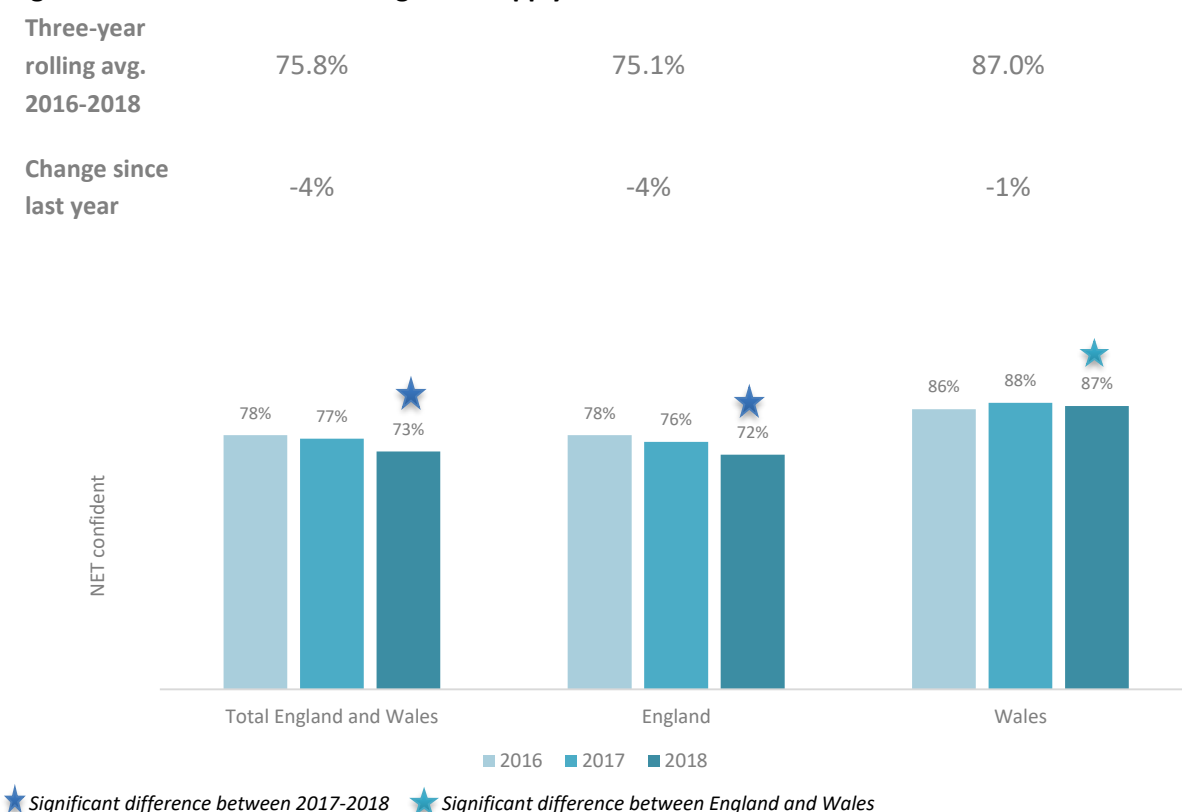


Table 46: Confidence in the long-term supply of water – WaSCs

| Confidence in the long-term supply of water | 2016 | 2017 | 2018 |
|---|------|------|------|
| Industry (2018 base sample: 5158) | 78% | 77% | 73% |
| Total WaSCs (2018 base sample: 3202) | 80% | 77% | 74% |
| Anglian Water (2018 base sample: 400) | 74% | 78% | 73% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 86% | 88% | 87% |
| Hafren Dyfrdwy (2018 base sample: 201) | n/a | n/a | 83% |
| Northumbrian Water (2018 base sample: 400) | 85% | 88% | 85% |
| Severn Trent Water (2018 base sample: 200) | 83% | 81% | 74% |
| South West Water (2018 base sample: 200) | 83% | 77% | 75% |
| Southern Water (2018 base sample: 200) | 74% | 63% | 64% |
| Thames Water (2018 base sample: 200) | 73% | 65% | 64% |

| | | | |
|--|-----|-----|-----|
| United Utilities (2018 base sample: 400) | 81% | 79% | 71% |
| Wessex Water (2018 base sample: 200) | 79% | 83% | 80% |
| Yorkshire Water (2018 base sample: 400) | 83% | 85% | 83% |

Footnote: Significant differences from the mean WaSC average in 2018 is denoted by green or red text

Table 47: Confidence in the long-term supply of water – WoCs

| Confidence in the long-term supply of water | 2016 | 2017 | 2018 |
|--|------------|------------|------------|
| Industry (2018 base sample: 5158) | 78% | 77% | 73% |
| Total WoCs (2018 base sample: 1956) | 73% | 73% | 69% |
| Affinity Water Central (2018 base sample: 150) | 67% | 70% | 61% |
| Affinity Water East (2018 base sample: 151) | 74% | 70% | 70% |
| Affinity Water Southeast (2018 base sample: 150) | 69% | 63% | 64% |
| Bournemouth Water (2018 base sample: 150) | 89% | 79% | 77% |
| Bristol Water (2018 base sample: 300) | 70% | 80% | 79% |
| Cambridge Water (2018 base sample: 150) | 79% | 82% | 71% |
| Essex & Suffolk Water (2018 base sample: 152) | 76% | 73% | 76% |
| Hartlepool Water (2018 base sample: 150) | 88% | 89% | 87% |
| Portsmouth Water (2018 base sample: 150) | 76% | 77% | 76% |
| South East Water (2018 base sample: 150) | 69% | 64% | 63% |
| South Staffs Water (2018 base sample: 153) | 79% | 83% | 77% |
| SES Water (2018 base sample: 150) | 66% | 68% | 60% |

Footnote: Significant differences from the mean WoC average in 2018 is denoted by green or red text

Chapter 6: Views on sewerage services

This chapter presents customer satisfaction with different aspects of their sewerage service including reducing smells from sewage treatment works, maintenance of sewerage pipes and treatment works, the cleaning of waste water before it is put back into rivers or the sea and the management of sewer flooding so that it is minimal. Respondents are then asked to rate their overall satisfaction with sewerage services.

6.1 Satisfaction with aspects of sewerage service

Figure 36 and Figure 37 shows the national trends for satisfaction with the four key aspects of sewerage service. This is followed by **Figure 37: Satisfaction with aspects of sewerage service (2)**

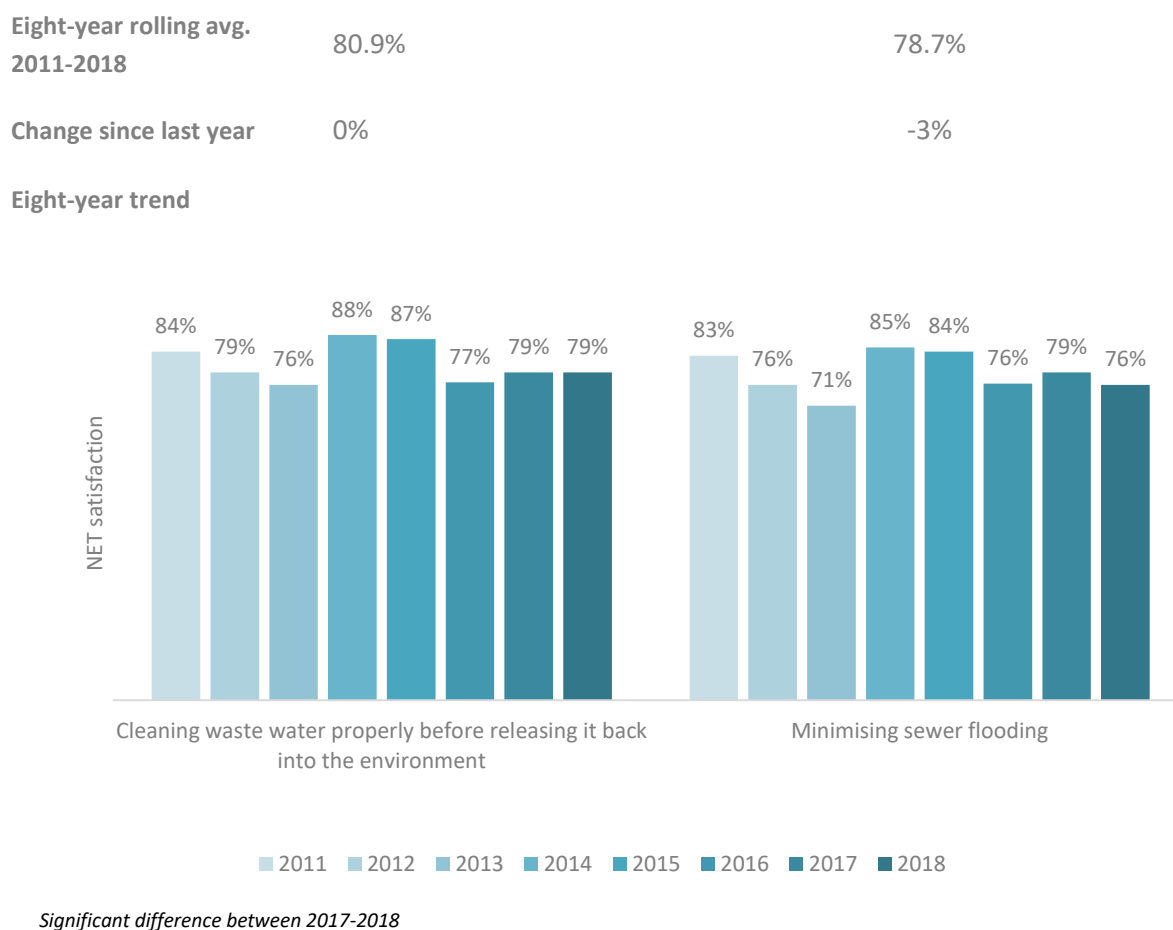


Figure 38 which compares satisfaction between England and Wales in 2018,

Table 48 and **Table 49** which show satisfaction in 2018 for each WaSC and WoC respectively, and finally **Table 50** and **Table 51** which highlight the eight-year trends for WaSCs and WoCs.

Figure 36: Satisfaction with aspects of sewerage service

| | | |
|-----------------------------------|-------|-------|
| Eight-year rolling avg. 2011-2018 | 77.0% | 80.9% |
|-----------------------------------|-------|-------|

Change since last year

0%

-1%

Eight-year trend

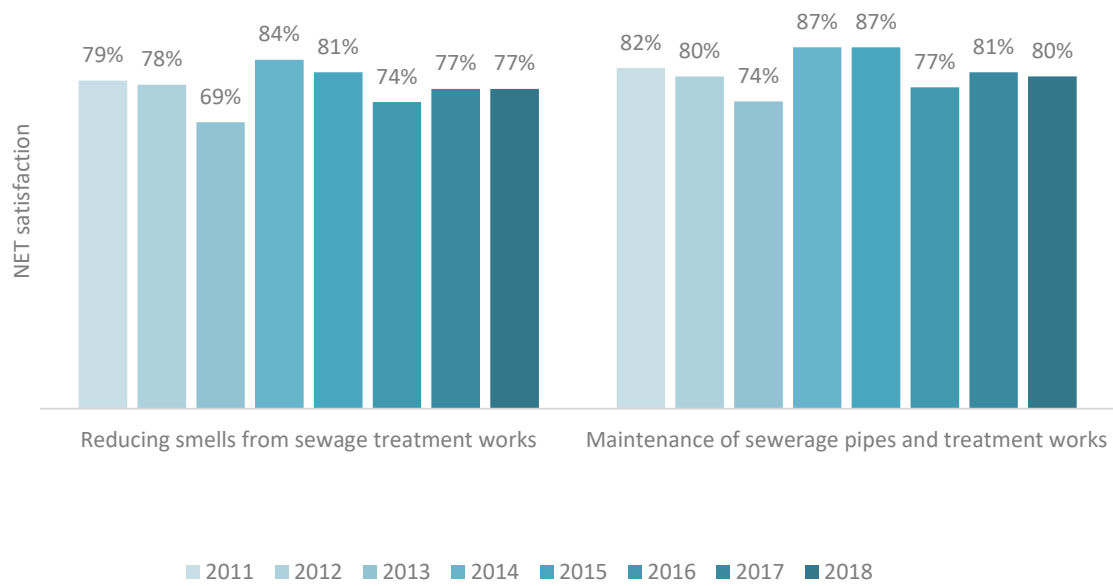


Figure 37: Satisfaction with aspects of sewerage service (2)

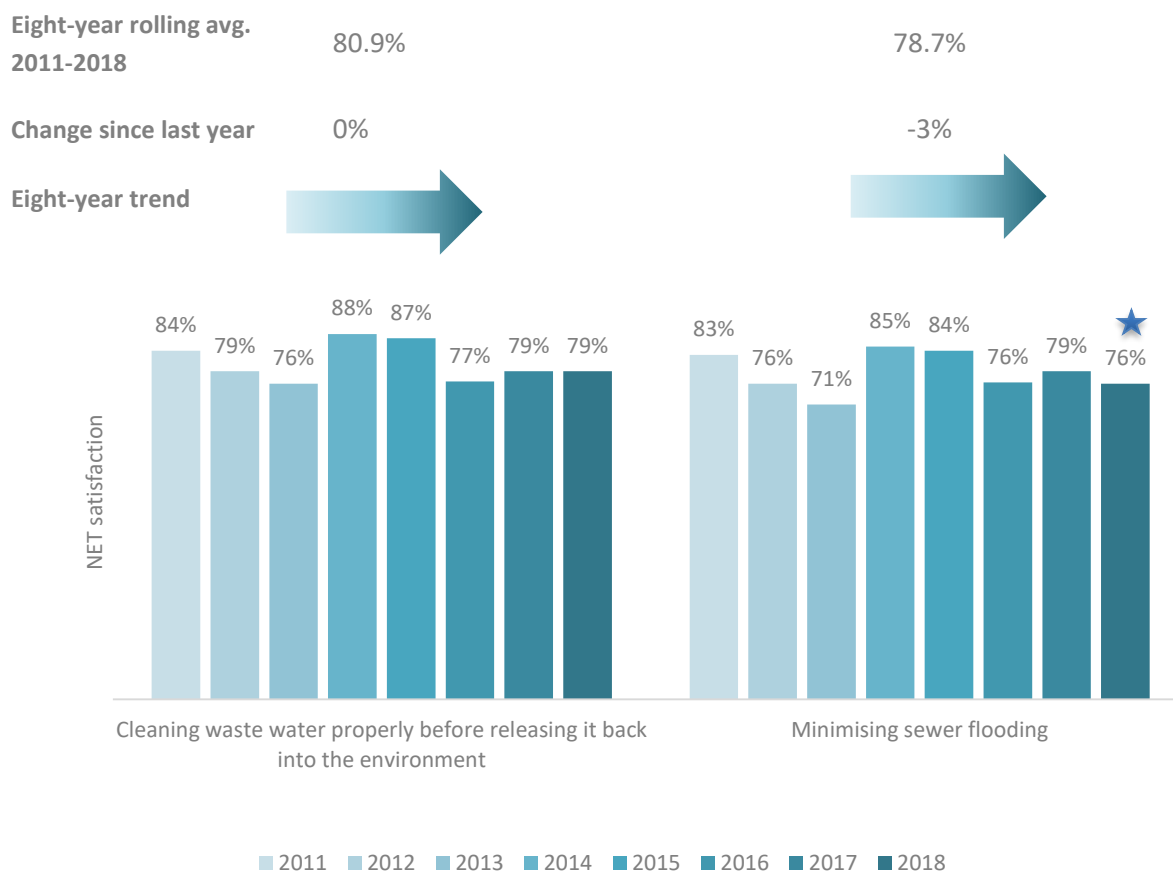


Figure 38: Satisfaction with aspects of sewerage service by nation

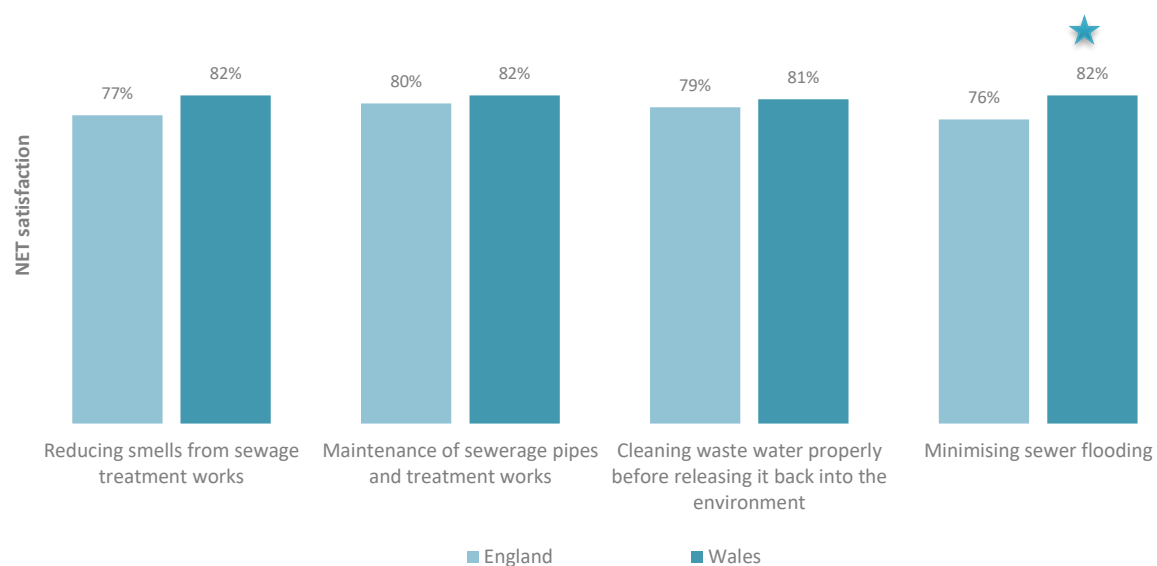


Table 48: Satisfaction with aspects of sewerage service in 2018 – WaSCs

| Satisfaction with aspects of sewerage (2018 data only) | Reducing smells from sewage treatment works | Maintenance of sewerage pipes and treatment works | Cleaning waste water properly before releasing back | Minimising sewer flooding |
|--|---|---|---|---------------------------|
| Industry (2018 base sample: 5158) | 77% | 80% | 79% | 76% |
| Total WaSCs (2018 base sample: 3202) | 77% | 81% | 80% | 77% |
| Anglian Water (2018 base sample: 400) | 76% | 79% | 78% | 76% |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 81% | 82% | 81% | 82% |
| Hafren Dyfrdwy (2018 base sample: 201) | 86% | 87% | 87% | 83% |
| Northumbrian Water (2018 base sample: 400) | 81% | 85% | 86% | 83% |
| Severn Trent Water (2018 base sample: 200) | 84% | 84% | 86% | 80% |
| South West Water (2018 base sample: 200) | 75% | 75% | 72% | 67% |
| Southern Water (2018 base sample: 200) | 75% | 72% | 75% | 73% |
| Thames Water (2018 base sample: 200) | 65% | 74% | 68% | 68% |
| United Utilities (2018 base sample: 400) | 77% | 83% | 81% | 77% |
| Wessex Water (2018 base sample: 200) | 79% | 81% | 82% | 76% |
| Yorkshire Water (2018 base sample: 400) | 84% | 85% | 87% | 83% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 49: Satisfaction with aspects of sewerage service in 2018 – WoCs

| Satisfaction with aspects of sewerage (2018 data only) | Reducing smells from sewage treatment works | Maintenance of sewerage pipes and treatment works | Cleaning waste water properly before releasing back | Minimising sewer flooding |
|--|---|---|---|---------------------------|
| Industry (2018 base sample: 5158) | 77% | 80% | 79% | 76% |
| Total WoCs (2018 base sample: 1956) | 77% | 78% | 77% | 74% |
| Affinity Water Central (2018 base sample: 150) | 85% | 78% | 79% | 72% |
| Affinity Water East (2018 base sample: 151) | 79% | 80% | 85% | 82% |
| Affinity Water Southeast (2018 base sample: 150) | 81% | 80% | 67% | 71% |
| Bournemouth Water (2018 base sample: 150) | 72% | 81% | 75% | 79% |
| Bristol Water (2018 base sample: 300) | 78% | 84% | 81% | 85% |
| Cambridge Water (2018 base sample: 150) | 77% | 82% | 82% | 80% |
| Essex & Suffolk Water (2018 base sample: 152) | 77% | 79% | 71% | 72% |
| Hartlepool Water (2018 base sample: 150) | 90% | 90% | 89% | 89% |
| Portsmouth Water (2018 base sample: 150) | 74% | 76% | 69% | 70% |
| South East Water (2018 base sample: 150) | 72% | 69% | 78% | 69% |
| South Staffs Water | 75% | 82% | 81% | 81% |

| | | | | |
|-----------------------------------|-----|-----|-----|-----|
| (2018 base sample: 153) | | | | |
| SES Water (2018 base sample: 150) | 60% | 70% | 69% | 60% |

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red. For WoCs, satisfaction with sewerage services may encompass more than one sewerage company – for example, Bournemouth Water's sewerage services are provided by Southern Water or Wessex Water.

Table 50: Satisfaction with aspects of sewerage service – WaSC eight-year trends trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of sewerage (Eight-year trend data) | Reducing smells from sewage treatment works | Maintenance of sewerage pipes and treatment works | Cleaning waste water properly before releasing back | Minimising sewer flooding |
|---|---|---|---|---------------------------|
| Industry (2018 base sample: 5158) | 77.0% ↔ | 80.9% ↔ | 80.9% ↔ | 78.7% ↔ |
| Total WaSCs (2018 base sample: 3202) | 77.2% ↔ | 81.2% ↔ | 81.2% ↔ | 79.1% ↔ |
| Anglian Water (2018 base sample: 400) | 76.3% ↔ | 81.8% ↔ | 83.3% ↓ | 80.6% ↔ |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 82.2% ↔ | 85.0% ↔ | 85.2% ↔ | 83.2% ↔ |
| Northumbrian Water (2018 base sample: 400) | 81.7% ↔ | 86.1% ↔ | 85.5% ↔ | 83.3% ↔ |
| Severn Trent Water (2018 base sample: 200) | 80.9% ↔ | 82.6% ↔ | 83.9% ↔ | 80.7% ↔ |
| South West Water (2018 base sample: 200) | 74.8% ↑ | 78.2% ↔ | 75.8% ↔ | 72.4% ↓ |
| Southern Water (2018 base sample: 200) | 75.6% ↔ | 80.5% ↓ | 77.8% ↓ | 76.6% ↓ |
| Thames Water (2018 base sample: 200) | 72.3% ↔ | 75.9% ↔ | 74.2% ↓ | 74.5% ↓ |
| United Utilities (2018 base sample: 400) | 76.3% ↔ | 81.6% ↔ | 83.1% ↔ | 80.5% ↔ |
| Wessex Water (2018 base sample: 200) | 78.7% ↔ | 84.0% ↔ | 82.9% ↔ | 80.4% ↔ |
| Yorkshire Water (2018 base sample: 400) | 77.7% ↔ | 82.0% ↔ | 82.2% ↔ | 79.4% ↔ |

Table 51: Satisfaction with aspects of sewerage service – WoC eight-year trends (arrows) and eight-year rolling averages (figures)

| Satisfaction with aspects of sewerage (Eight-year trend data) | Reducing smells from sewage treatment works | Maintenance of sewerage pipes and treatment works | Cleaning waste water properly before releasing back | Minimising sewer flooding |
|---|---|---|---|---------------------------|
| Industry (2018 base sample: 5158) | 77.0% ↔ | 80.9% ↔ | 80.9% ↔ | 78.7% ↔ |
| Total WoCs (2018 base sample: 1956) | 76.2% ↔ | 79.9% ↔ | 79.7% ↔ | 77.3% ↔ |
| Affinity Water Central (2018 base sample: 150) | 78.3% ↔ | 79.9% ↓ | 78.6% ↔ | 74.8% ↔ |
| Affinity Water East (2018 base sample: 151) | 76.5% ↔ | 79.2% ↔ | 80.3% ↓ | 80.8% ↔ |
| Affinity Water Southeast (2018 base sample: 150) | 77.5% ↔ | 79.6% ↔ | 78.6% ↔ | 77.9% ↓ |
| Bournemouth Water (2018 base sample: 150) | 70.0% ↑ | 80.7% ↔ | 79.9% ↔ | 79.6% ↑ |
| Bristol Water (2018 base sample: 300) | 79.3% ↔ | 83.7% ↔ | 82.3% ↔ | 82.5% ↔ |
| Cambridge Water (2018 base sample: 150) | 73.9% ↔ | 79.8% ↔ | 83.0% ↔ | 80.7% ↔ |
| Essex & Suffolk Water (2018 base sample: 152) | 72.9% ↔ | 78.0% ↔ | 78.1% ↓ | 74.7% ↓ |
| Hartlepool Water (2018 base sample: 150) | 84.0% ↔ | 85.6% ↔ | 85.6% ↔ | 85.6% ↔ |
| Portsmouth Water (2018 base sample: 150) | 76.3% ↔ | 79.8% ↔ | 76.5% ↓ | 75.4% ↔ |

| | | | | |
|---|---------|---------|---------|---------|
| South East Water (2018 base sample: 150) | 75.3% ↔ | 77.7% ↓ | 77.8% ↔ | 76.1% ↔ |
| South Staffs Water (2018 base sample: 153) | 79.3% ↔ | 83.3% ↔ | 84.8% ↔ | 82.9% ↔ |
| SES Water (2018 base sample: 150) | 71.4% ↓ | 77.3% ↓ | 79.7% ↔ | 73.8% ↔ |

6.2 Overall satisfaction with sewerage services

After rating satisfaction with different aspects of sewerage services, customers are asked for their overall level of satisfaction with their sewerage services. Figure 39 shows eight-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by Table 52 and Table 53 which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 39: Overall satisfaction with sewerage service

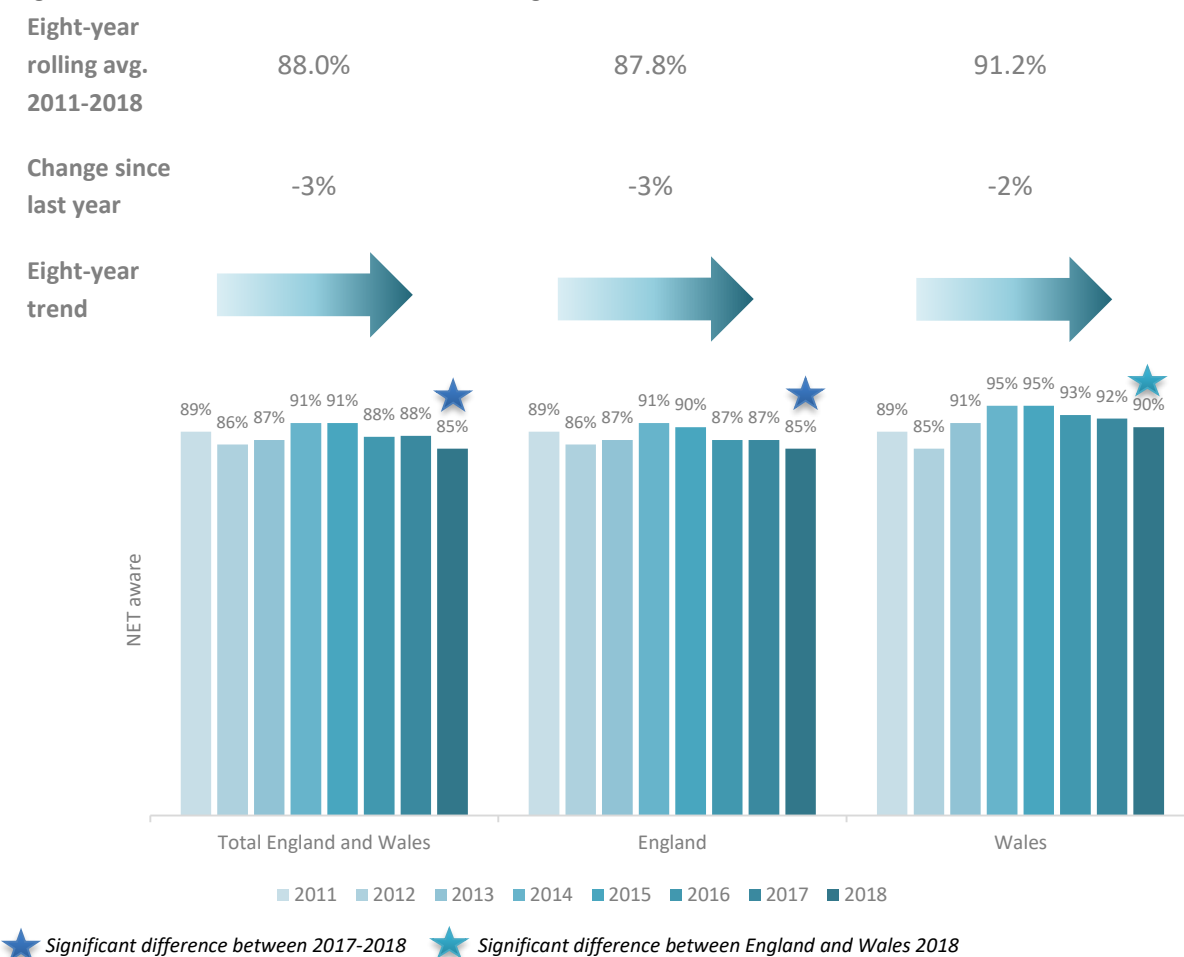
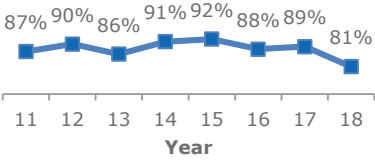
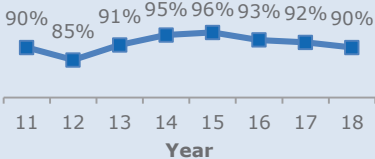
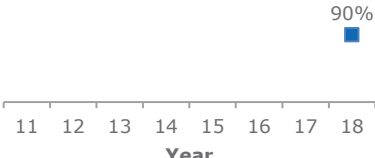
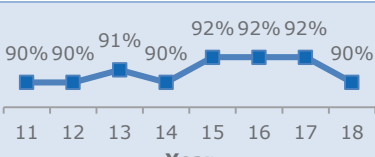
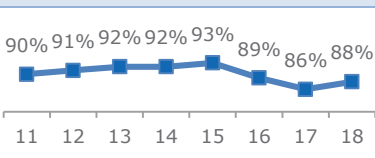
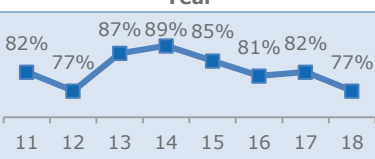
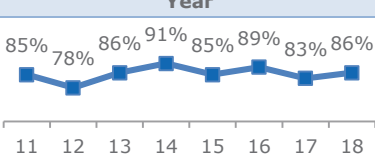
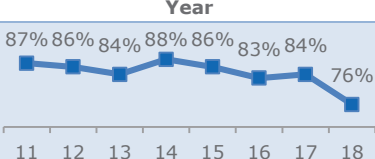
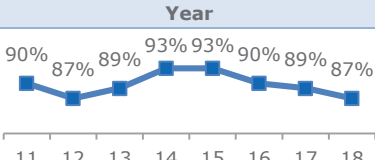
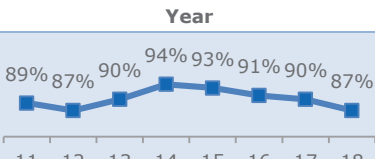


Table 52: Overall satisfaction with sewerage service – WaSCs

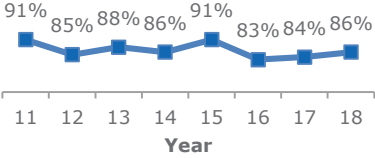
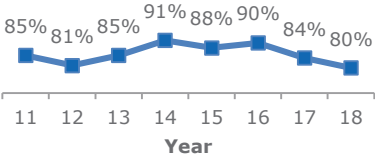
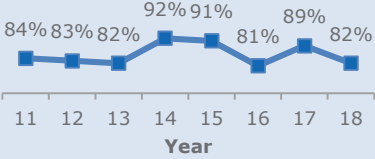
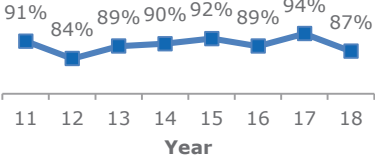

| Satisfaction with sewerage service | Eight-year rolling company average | Eight-year company trend | | | | | | | | Eight-year trend | Company average vs WaSC average | Change since last year |
|--------------------------------------|------------------------------------|--------------------------|-----|-----|-----|-----|-----|-----|-----|------------------|---------------------------------|------------------------|
| | | '11 | '12 | '13 | '14 | '15 | '16 | '17 | '18 | | | |
| Industry (2018 base sample: 5158) | 88.0% | 89% | 86% | 87% | 91% | 91% | 88% | 88% | 85% | ↔ | n/a | -3% |
| Total WaSCs (2018 base sample: 3202) | 88.3% | 89% | 87% | 88% | 91% | 91% | 88% | 87% | 85% | ↔ | 85% | -3% |

| Anglian Water (2018 base sample: 400) | 88.0% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>87%</td></tr><tr><td>12</td><td>90%</td></tr><tr><td>13</td><td>86%</td></tr><tr><td>14</td><td>91%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>88%</td></tr><tr><td>17</td><td>89%</td></tr><tr><td>18</td><td>81%</td></tr></table> | Year | Compliance (%) | 11 | 87% | 12 | 90% | 13 | 86% | 14 | 91% | 15 | 92% | 16 | 88% | 17 | 89% | 18 | 81% | ↔ | ↔ | -8% |
|--|----------------|--|------|----------------|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|-----|---|-----|
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 81% | | | | | | | | | | | | | | | | | | | | | | |
| Dŵr Cymru Welsh Water (2018 base sample: 401) | 91.3% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>85%</td></tr><tr><td>13</td><td>91%</td></tr><tr><td>14</td><td>95%</td></tr><tr><td>15</td><td>96%</td></tr><tr><td>16</td><td>93%</td></tr><tr><td>17</td><td>92%</td></tr><tr><td>18</td><td>90%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | 85% | 13 | 91% | 14 | 95% | 15 | 96% | 16 | 93% | 17 | 92% | 18 | 90% | ↔ | ↑ | -2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 95% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 96% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| Hafren Dyfrdwy (2018 base sample: 201) | 90.1% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td></td></tr><tr><td>13</td><td></td></tr><tr><td>14</td><td></td></tr><tr><td>15</td><td></td></tr><tr><td>16</td><td></td></tr><tr><td>17</td><td></td></tr><tr><td>18</td><td>90%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | | 13 | | 14 | | 15 | | 16 | | 17 | | 18 | 90% | n/a | ↔ | n/a |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| Northumbrian Water (2018 base sample: 400) | 91.0% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>90%</td></tr><tr><td>13</td><td>91%</td></tr><tr><td>14</td><td>90%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>92%</td></tr><tr><td>17</td><td>92%</td></tr><tr><td>18</td><td>90%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | 90% | 13 | 91% | 14 | 90% | 15 | 92% | 16 | 92% | 17 | 92% | 18 | 90% | ↑ | ↑ | -1% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| Severn Trent Water (2018 base sample: 200) | 90.2% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>91%</td></tr><tr><td>13</td><td>92%</td></tr><tr><td>14</td><td>92%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>89%</td></tr><tr><td>17</td><td>86%</td></tr><tr><td>18</td><td>88%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | 91% | 13 | 92% | 14 | 92% | 15 | 93% | 16 | 89% | 17 | 86% | 18 | 88% | ↔ | ↔ | 2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 92% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| South West Water (2018 base sample: 200) | 82.5% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>82%</td></tr><tr><td>12</td><td>77%</td></tr><tr><td>13</td><td>87%</td></tr><tr><td>14</td><td>89%</td></tr><tr><td>15</td><td>85%</td></tr><tr><td>16</td><td>81%</td></tr><tr><td>17</td><td>82%</td></tr><tr><td>18</td><td>77%</td></tr></table> | Year | Compliance (%) | 11 | 82% | 12 | 77% | 13 | 87% | 14 | 89% | 15 | 85% | 16 | 81% | 17 | 82% | 18 | 77% | ↔ | ↓ | -5% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 82% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 81% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 82% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 77% | | | | | | | | | | | | | | | | | | | | | | |
| Southern Water (2018 base sample: 200) | 85.2% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>85%</td></tr><tr><td>12</td><td>78%</td></tr><tr><td>13</td><td>86%</td></tr><tr><td>14</td><td>91%</td></tr><tr><td>15</td><td>85%</td></tr><tr><td>16</td><td>89%</td></tr><tr><td>17</td><td>83%</td></tr><tr><td>18</td><td>86%</td></tr></table> | Year | Compliance (%) | 11 | 85% | 12 | 78% | 13 | 86% | 14 | 91% | 15 | 85% | 16 | 89% | 17 | 83% | 18 | 86% | ↔ | ↔ | 3% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 78% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 85% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 83% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| Thames Water (2018 base sample: 200) | 84.5% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>87%</td></tr><tr><td>12</td><td>86%</td></tr><tr><td>13</td><td>84%</td></tr><tr><td>14</td><td>88%</td></tr><tr><td>15</td><td>86%</td></tr><tr><td>16</td><td>83%</td></tr><tr><td>17</td><td>84%</td></tr><tr><td>18</td><td>76%</td></tr></table> | Year | Compliance (%) | 11 | 87% | 12 | 86% | 13 | 84% | 14 | 88% | 15 | 86% | 16 | 83% | 17 | 84% | 18 | 76% | ↓ | ↓ | -8% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 84% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 88% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 86% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 83% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 84% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 76% | | | | | | | | | | | | | | | | | | | | | | |
| United Utilities (2018 base sample: 400) | 89.6% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>87%</td></tr><tr><td>13</td><td>89%</td></tr><tr><td>14</td><td>93%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>90%</td></tr><tr><td>17</td><td>89%</td></tr><tr><td>18</td><td>87%</td></tr></table> | Year | Compliance (%) | 11 | 90% | 12 | 87% | 13 | 89% | 14 | 93% | 15 | 93% | 16 | 90% | 17 | 89% | 18 | 87% | ↔ | ↔ | -2% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| Wessex Water (2018 base sample: 200) | 90.2% |  <table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>89%</td></tr><tr><td>12</td><td>87%</td></tr><tr><td>13</td><td>90%</td></tr><tr><td>14</td><td>94%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>91%</td></tr><tr><td>17</td><td>90%</td></tr><tr><td>18</td><td>87%</td></tr></table> | Year | Compliance (%) | 11 | 89% | 12 | 87% | 13 | 90% | 14 | 94% | 15 | 93% | 16 | 91% | 17 | 90% | 18 | 87% | ↔ | ↔ | -3% |
| Year | Compliance (%) | | | | | | | | | | | | | | | | | | | | | | |
| 11 | 89% | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 87% | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 94% | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 93% | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 91% | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 90% | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 87% | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | |
|---|-------|---|---|---|----|
| Yorkshire Water (2018 base sample: 400) | 89.6% | <p>94% 85% 87% 91% 92% 91% 89% 88%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 0% |
|---|-------|---|---|---|----|

Table 53: Overall satisfaction with sewerage service – WoCs

| Satisfaction with sewerage service | Eight-year rolling company average | Eight-year company trend '11 '12 '13 '14 '15 '16 '17 '18 | Eight-year trend | Company average vs WoC average | Change since last year |
|--|------------------------------------|---|------------------|--------------------------------|------------------------|
| Industry (2018 base sample: 5158) | 88.0% | <p>89% 86% 87% 91% 91% 88% 88% 85%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | n/a | -3% |
| Total WoCs (2018 base sample: 1956) | 87.0% | <p>89% 83% 85% 91% 91% 85% 88% 86%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | 86% | -3% |
| Affinity Water Central (2018 base sample: 150) | 86.1% | <p>85% 81% 85% 89% 89% 85% 88% 87%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 0% |
| Affinity Water East (2018 base sample: 151) | 85.3% | <p>88% 81% 81% 94% 89% 85% 81% 82%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | 1% |
| Affinity Water Southeast (2018 base sample: 150) | 84.9% | <p>81% 90% 78% 90% 88% 83% 85% 82%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -3% |
| Bournemouth Water (2018 base sample: 150) | 88.7% | <p>87% 83% 83% 91% 91% 94% 89% 91%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↑ | ↔ | 2% |
| Bristol Water (2018 base sample: 300) | 89.7% | <p>91% 85% 88% 92% 91% 85% 93% 91%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↑ | -1% |
| Cambridge Water (2018 base sample: 150) | 89.1% | <p>91% 89% 87% 94% 87% 88% 90% 88%</p> <p>11 12 13 14 15 16 17 18</p> <p>Year</p> | ↔ | ↔ | -1% |

| | | | | | |
|--|-------|---|---|---|-----|
| Essex & Suffolk Water (2018 base sample: 152) | 86.7% |  | ↓ | ↔ | 2% |
| Hartlepool Water (2018 base sample: 150) | 92.1% |  | ↔ | ↑ | 2% |
| Portsmouth Water (2018 base sample: 150) | 85.5% |  | ↔ | ↔ | -4% |
| South East Water (2018 base sample: 150) | 85.5% |  | ↔ | ↔ | -7% |
| South Staffs Water (2018 base sample: 153) | 89.6% |  | ↔ | ↔ | -7% |
| SES Water (2018 base sample: 150) | 85.5% |  | ↔ | ↓ | -6% |

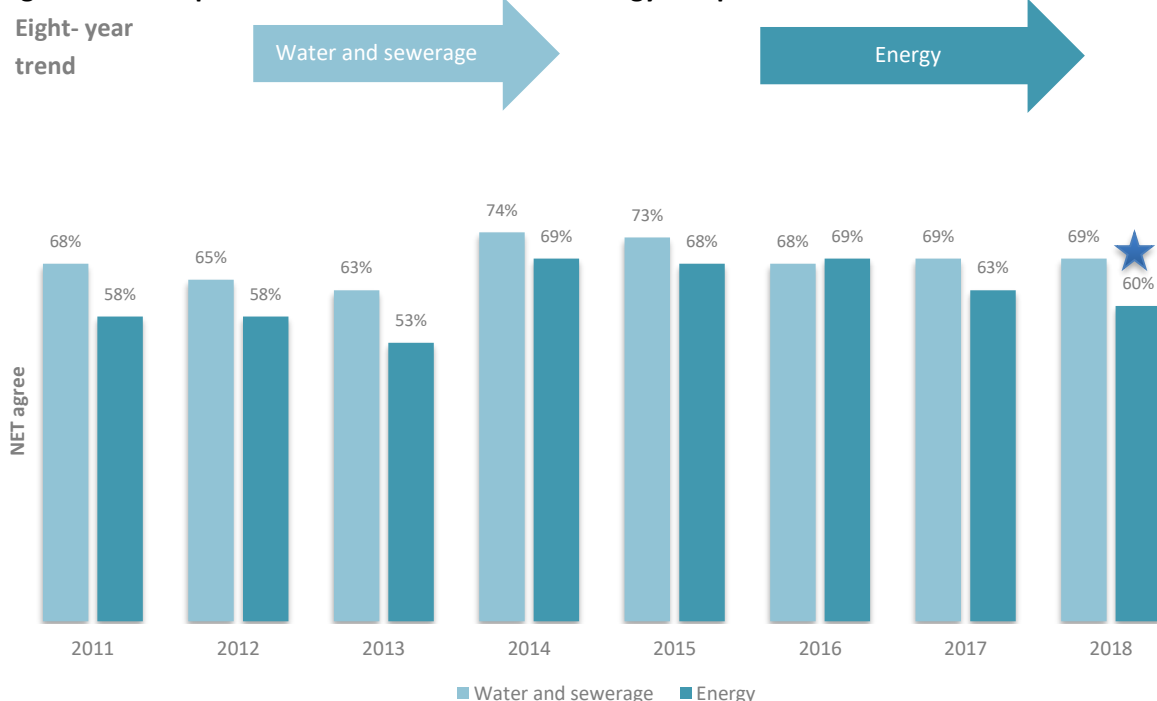
Chapter 7: Comparisons of customer views on water and sewerage companies with their views on other service providers

Respondents are asked several questions about other utility services and providers to help understand how customer perceptions of water companies compare to other service providers. This includes their views on how much companies care about the service they provide, trust in companies, views on value for money and satisfaction with the service provided.

7.1 Perceptions that water and energy companies care about the services they provide

Figure 40 shows how views on care compare between water companies and energy service providers.

Figure 40: Perceptions of how much water and energy companies care about their services



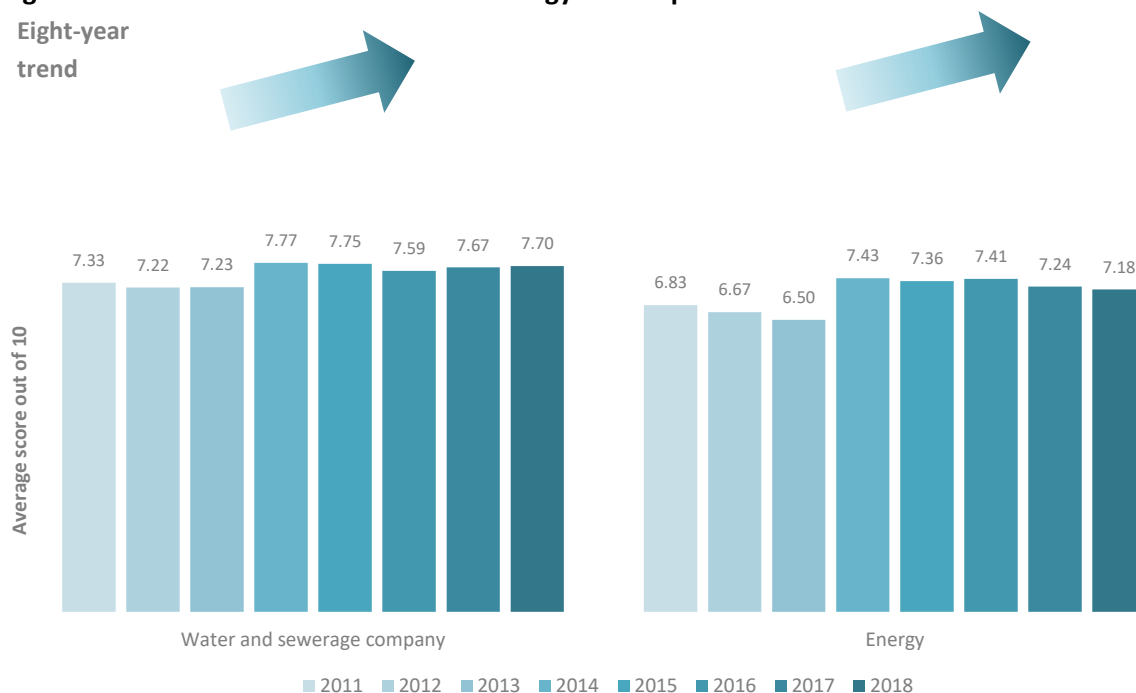
★ Significant difference between 2017-2018 data

7.2 Comparison of customer trust in water and in energy service providers

On a scale of 1 to 10, respondents were asked to rate how much they trust their water company and their energy provider, with 10 being complete trust and 1 being distrust.

Figure 41: Relative trust in water and in energy service providers

Eight-year
trend

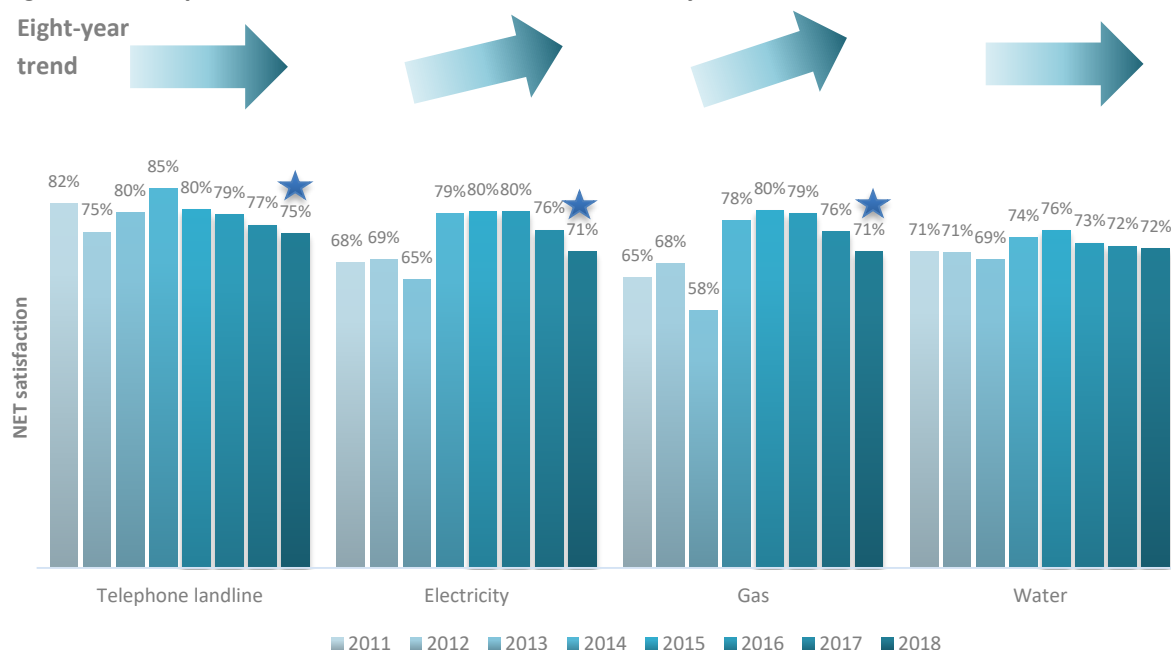


7.3 Comparative satisfaction with value for money of household services

As well as being asked for their views on water and sewerage services, respondents are asked to rate their satisfaction with value for money of a range of other household service providers including energy, telecoms and council services. Figure 42 and Figure 43 refer.

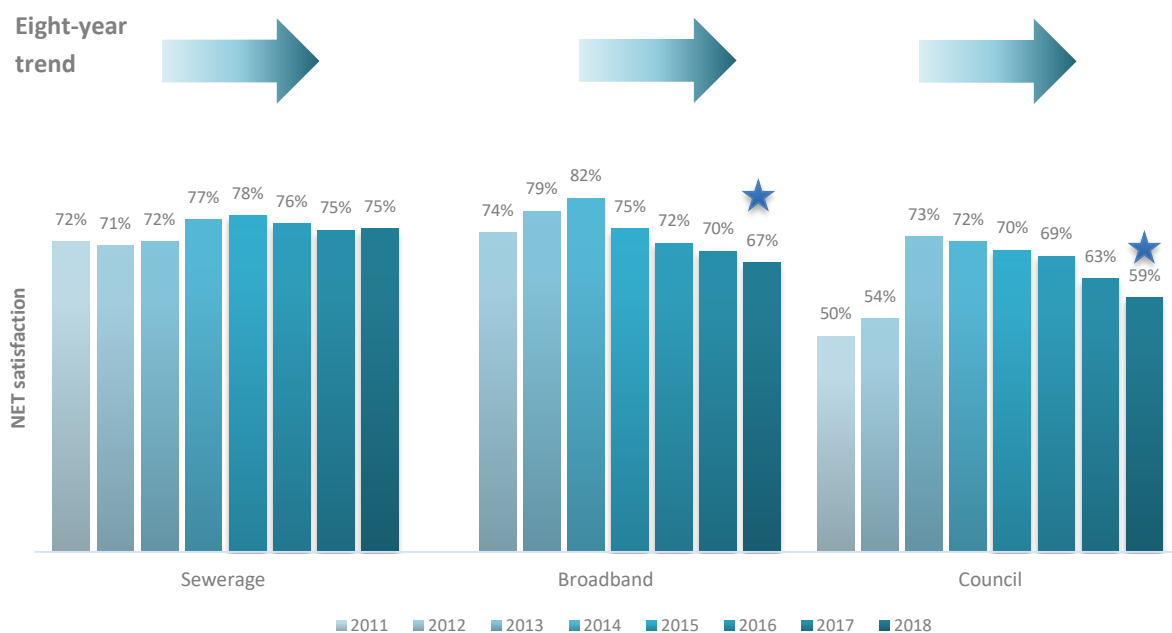
Figure 42: Comparative satisfaction with value for money of household services

Eight-year
trend



★ Significant difference between 2017-2018

Figure 43: Comparative satisfaction with value for money of household services



7.4 Comparative satisfaction with household services

As well as being asked for their satisfaction with water and sewerage services, respondents are asked to rate this for a range of other household service providers including energy, telecoms and council services.

Figure 44 and Figure 45

Figure 44: Comparative satisfaction with household services

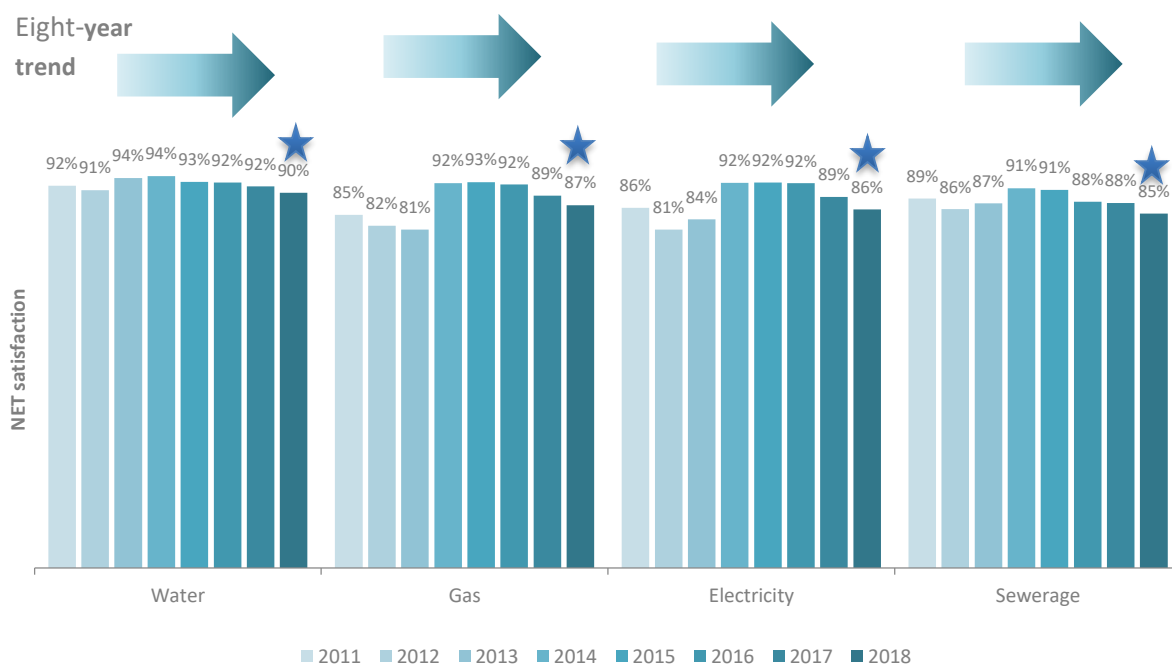
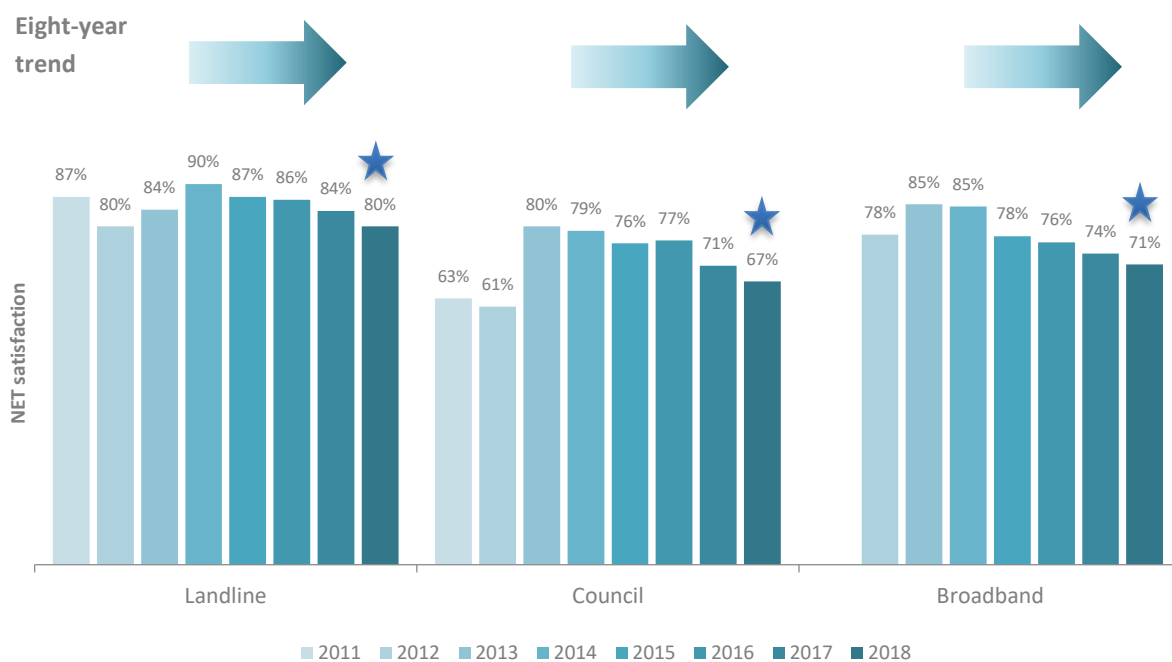


Figure 45: Comparative satisfaction with household services



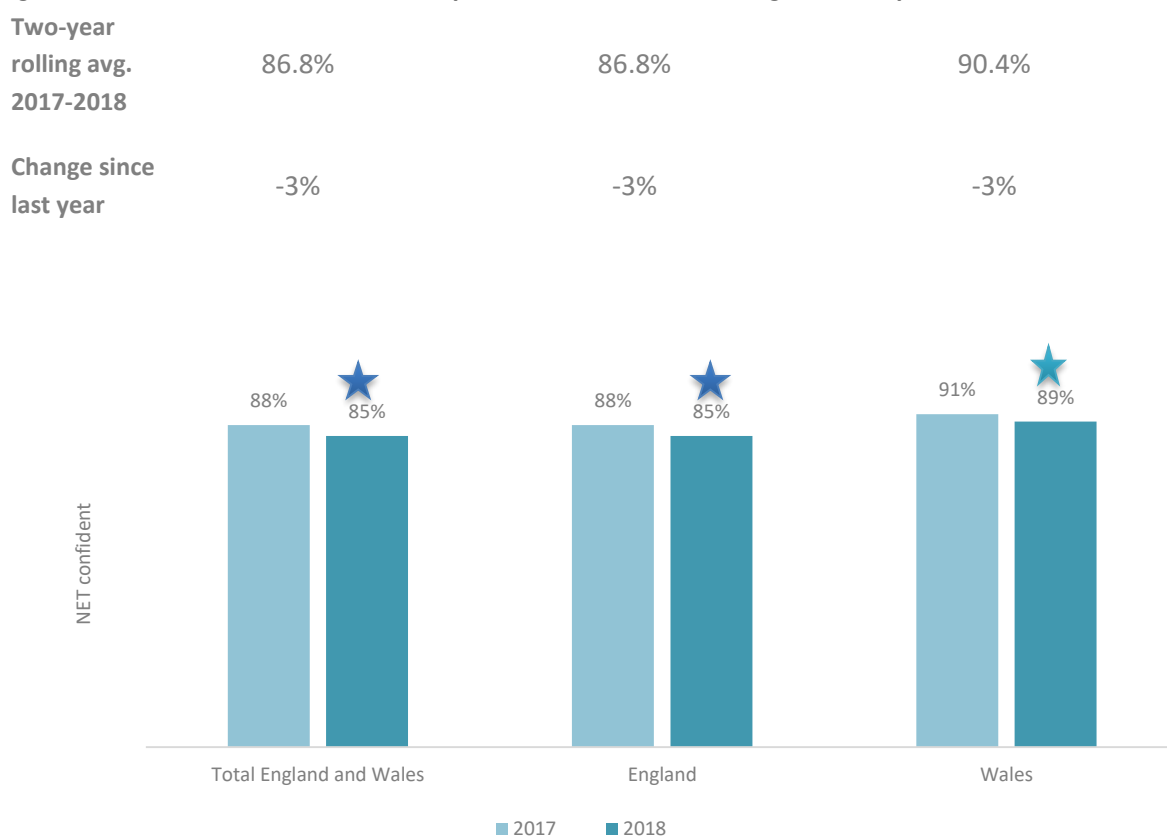
★ Significant difference between 2017-2018

Chapter 8: Overall experience measures

This final chapter covers overall experience. This is measured via a new question which was added to the Water Matters survey in 2017, to find out, all things considered, how customers rate their overall satisfaction with their water company. Data from 2017 and 2018 is shown in Figure 46. This is followed by their likelihood to recommend their water/sewerage company as a provider of services, shown in a Net Promoter Score (NPS) format.

8.1 Overall satisfaction

Figure 46: Satisfaction with overall experience of water/sewerage service provider



Significant difference between 2017-2018



Significant difference between England and Wales 2018

8.2 Likelihood to recommend water company

Customers are asked, hypothetically speaking, if it were possible to choose their water supplier, how likely they would be to recommend their water company to friends and family on a scale of 0 to 10, with 0 being 'not at all likely to recommend' and 10 being 'extremely likely to recommend'.

Customers rating 0 to 6 are classed as 'detractors', 7 to 8 are 'passives' and 9 to 10 are considered 'promoters'. A Net Promoter Score (NPS) is calculated for each company by subtracting the detractors from the promoters. The higher the NPS, the more positive a customer is towards the water company. A negative score is possible when there are more detractors than promoters.

Table 54 below shows the NPS for each WaSC and each WoC based on likelihood to recommend them as a provider of water services.

Table 54: Likelihood to recommend water company as a provider of water services – WaSCs and WoCs

| WaSC | NPS Score | WoC | NPS Score |
|------------------|-----------|---------------------|-----------|
| Anglian | 18 | Affinity Central | -1 |
| Dŵr Cymru | 44 | Affinity East | 6 |
| Hafren Dyfrdwy | 25 | Affinity South East | 0 |
| Northumbrian | 38 | Bournemouth | 27 |
| Severn Trent | 20 | Bristol | 24 |
| South West | -10 | Cambridge | 29 |
| Southern | -7 | Essex & Suffolk | 25 |
| Thames | 6 | Hartlepool | 37 |
| United Utilities | 16 | Portsmouth | 24 |
| Wessex | 18 | South East | 3 |
| Yorkshire | 38 | South Staffordshire | 13 |
| | | SES | 10 |

8.3 Likelihood to recommend sewerage company – WoCs

As they receive services from two different companies, customers of WoCs were also asked how likely they would be to recommend their sewerage service provider to friends and family using the same scale of 0 to 10. This is shown in Table 55 below:

Table 55: Likelihood to recommend sewerage company as a provider of sewerage services – WoCs

| WoC | NPS Score |
|---------------------|-----------|
| Affinity Central | 3 |
| Affinity East | 5 |
| Affinity South East | -10 |
| Bournemouth | 28 |
| Bristol | 20 |
| Cambridge | 21 |
| Essex & Suffolk | 23 |
| Hartlepool | 37 |
| Portsmouth | 0 |
| South East | -9 |
| South Staffordshire | 5 |

| | |
|-----|---|
| SES | 0 |
|-----|---|

Appendices

A1. Sample profile

| | | Unweighted | | Weighted | |
|--------------------------------|--|------------|-----|----------|-----|
| | | No | % | No | % |
| Gender | Male | 2400 | 47% | 2415 | 47% |
| | Female | 2758 | 53% | 2743 | 53% |
| Age | 18-29 | 165 | 3% | 247 | 5% |
| | 30-44 | 841 | 16% | 974 | 19% |
| | 45-59 | 1872 | 36% | 1841 | 36% |
| | 60-74 | 1468 | 28% | 1335 | 26% |
| | 75+ | 812 | 16% | 760 | 15% |
| SEC | Higher managerial, administrative & professional occupations | 2264 | 44% | 2272 | 44% |
| | Intermediate Occupations | 1132 | 22% | 1167 | 23% |
| | Routine & manual occupations | 1241 | 24% | 1158 | 22% |
| | Long term unemployed/student | 464 | 9% | 499 | 10% |
| Household Composition | With children | 1018 | 20% | 1086 | 21% |
| | Without children | 4014 | 78% | 3955 | 77% |
| Ethnicity | White | 4789 | 93% | 4641 | 90% |
| | Mixed | 61 | 1% | 102 | 2% |
| | Asian | 96 | 2% | 163 | 3% |
| | Black | 38 | 1% | 74 | 1% |
| | Other | 28 | 1% | 47 | 1% |
| Disability in household | Yes | 1184 | 23% | 1144 | 22% |
| | No | 3871 | 75% | 3929 | 76% |
| Tenure | Owner occupied | 4031 | 78% | 3934 | 76% |
| | Private rental | 401 | 8% | 485 | 9% |
| | Council tenant | 294 | 6% | 302 | 6% |
| | Housing Association tenant | 231 | 4% | 259 | 5% |
| | Leaseholder | 20 | 0% | 33 | 1% |

| | | Unweighted | | Weighted | |
|-------------------------------------|-------------------------------------|------------|-----|----------|-----|
| Meter in household | Yes | 2817 | 56% | 2754 | 55% |
| | No | 2238 | 44% | 2288 | 45% |
| Meter fitting (where meter present) | Already fitted | 1302 | 46% | 1286 | 47% |
| | Requested fitting | 1022 | 36% | 981 | 36% |
| | Fitted as part of a metering scheme | 415 | 15% | 422 | 15% |
| Income | Less than £10,000 | 350 | 7% | 347 | 7% |
| | £10,000 to £19,999 | 780 | 15% | 756 | 15% |
| | £20,000 to £29,999 | 696 | 13% | 690 | 13% |
| | £30,000 to £39,999 | 445 | 9% | 438 | 8% |
| | £40,000 to £49,999 | 408 | 8% | 406 | 8% |
| | £50,000 to £74,999 | 465 | 9% | 513 | 10% |
| | £75,000 to £99,999 | 193 | 4% | 205 | 4% |
| | £100,000 or more | 158 | 3% | 197 | 4% |
| Receive benefits | Yes | 1014 | 20% | 1037 | 20% |
| | No | 3859 | 75% | 3859 | 75% |
| Internet access | Yes | 4638 | 90% | 4677 | 91% |
| | No | 474 | 9% | 443 | 9% |
| Urbanicity | Urban | 1972 | 38% | 2158 | 42% |
| | Rural | 1371 | 27% | 1279 | 25% |
| | Suburban/semi-rural | 1635 | 32% | 1572 | 30% |

A2. Questionnaire

DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH

Tel: 01663-767857 – JN 4616 V1, 2018-19

Introduction

Good morning/afternoon, my name is I am calling from DJS Research on behalf of the Consumer Council for Water, the **water watch dog** who are responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are carrying out a survey about water and sewerage services. Your views will help to ensure the water industry continues to provide a fair and affordable service to its customers. **As a thank-you for taking part in the survey you will be entered into a prize draw where you have a chance of winning £250 as the first prize and £100 as the second prize.**

Towards the end of the survey we will also ask you a couple of questions about your employment status – this information is only collected to ensure we have a good mix of people included in the survey, it will not be used for any other purpose.

Could you spare some time to answer some questions?

READ OUT IF NECESSARY

Survey Details

The survey should take around 20 minutes. We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict Market Research Society Code of Conduct.

INT: READ OUT: Just to let you know, calls may be recorded for quality and training purposes

| | | |
|--------------------------|---|---------------|
| Willing to take part | 1 | Continue |
| Not willing to take part | 2 | Thank & close |

Screener Questions

| | | |
|------------|--|--|
| S1 DELETED | | |
|------------|--|--|

| | | |
|---|---|---|
| <p>ASK ALL</p> <p>Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey:</p> <p>S3 In terms of how you pay your water bills, do you have sole responsibility for paying them, shared responsibility or no responsibility? If respondent says they pay their water will as part of their rent, code as 4. READ OUT</p> <p>I have sole responsibility</p> <p>I share payment of the bills</p> <p>I am not the water bill payer in my household</p> <p>I pay my water bill as part of my rent</p> <p>Other (specify)</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>80</p> <p>85</p> | <p>S4</p> <p>S4</p> <p>S2</p> <p>S2</p> <p>S4</p> <p>S2</p> |
| <p>ASK IF NO/DON'T KNOW AT S1. OTHERS GO TO S2</p> <p>S2 Is there somebody else in the household who is the bill payer? SINGLE CODE</p> <p>Yes</p> <p>No</p> <p>-----</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>85</p> | <p>RETURN TO INTRO</p> <p>CLOSE</p> |
| <p>ASK ALL</p> <p>S4 Do you or any member of your family work in.....:</p> <p>READ OUT</p> <p>The water industry i.e. work for a water company</p> <p>A consumer organisation e.g. Passenger Focus, Energy Ombudsman</p> <p>Which?, Citizens Advice</p> <p>Market Research</p> <p>-----</p> <p>None of the above</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>87</p> | <p>Thank and close</p> <p>D1</p> |

| | | |
|---|----|---------------|
| ASK ALL | | |
| D1 Please record the gender of the respondent DO NOT ASK | | |
| Male | 1 | |
| Female | 2 | |
| ASK ALL | | |
| D2 Can you please tell me your age? PROMPT WITH BANDS IF NECESSARY | | |
| CODE AGE INTO CORRECT BANDING. SINGLE CODE | | |
| 18-19 | 1 | |
| 20-24 | 2 | |
| 25-29 | 3 | |
| 30-44 | 4 | |
| 45-59 | 5 | |
| 60-64 | 6 | |
| 65-74 | 7 | |
| 75+ | 8 | |
| Refused | 86 | SCREEN OUT |
| D3 MOVED TO END | | |

| | | |
|--|----|---|
| ASK ALL | | |
| D4a NEW: <u>At home</u>, do you have: | | |
| READ OUT AND CODE FOR EACH | | |
| a) Telephone landline, b) Access to broadband | | |
| Yes | 1 | |
| No | 2 | |
| Don't know | 86 | |
| IF D4aa_1 (IF HAVE A LANDLINE) | | |
| D4b Do you use your landline for telephone calls? | | |
| Yes | 1 | , |
| No | 2 | |
| IF D4aa_86 (DON'T KNOW) OR IF D4b_2 (DON'T USE LANDLINE FOR CALLS) | | |
| D4c Do you use a mobile for telephone calls? | | |
| Yes | 1 | |
| No | 2 | |
| MOBILE SAMPLE INCLUDES: <i>D4aa_2 (NO TELEPHONE LANDLINE) OR D4aa_1 (TELEPHONE LANDLINE) AND D4b_2 (DON'T USE FOR TELEPHONE CALLS) AND D4c_1 (USE MOBILE FOR CALLS) OR IF D4aa_86 (DON'T KNOW) AND D4c_1 (USE MOBILE)</i> | | |
| D5 – D9 MOVED TO END OF SURVEY | | |

| | | |
|--|----|-------|
| ASK ALL | | |
| Q1a Who is your water company? (This may be a company which deals with your sewerage too.) SINGLE CODE | | |
| DO NOT READ OUT COMPANY FROM SAMPLE. IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS" | | |
| Anglian Water Services Ltd | 1 | Q2 |
| Dŵr Cymru Cyfyngedig (Welsh Water) | 2 | |
| Northumbrian Water Ltd | 3 | |
| Severn Trent Water Ltd | 4 | |
| South West Water Ltd | 5 | |
| Southern Water Services Ltd | 6 | |
| Thames Water Utilities Ltd | 7 | |
| United Utilities Water Plc (North West Water) | 8 | |
| Wessex Water Services Ltd | 9 | |
| Yorkshire Water Services Ltd | 10 | |
| ----- | | |
| Water only companies | | Q3 |
| Bournemouth Water Plc | 11 | |
| Bristol Water Plc | 12 | |
| Cambridge Water Company Plc | 13 | |
| Cholderton & District Water Company Ltd | 14 | CLOSE |
| ----- | | |
| Essex & Suffolk Water | 16 | Q3 |
| Affinity Water South East (formerly Veolia Water Southeast and Folkestone & Dover Water Services) | 17 | |
| | 18 | |
| Hartlepool Water Plc | 19 | |
| Portsmouth Water Plc | 20 | |
| South East Water Plc (including Mid Kent Water Plc) | 21 | |
| South Staffordshire Water Plc | | |

| | | |
|--|----|---|
| SES Water Plc | 22 | |
| Affinity Water East (formerly Veolia Water East Ltd and Tendring Hundred Water Services) | 23 | |
| Affinity Water Central (formerly Veolia Water Central and Three Valleys Water) | 24 | |
| Hafren Dyfrydwy | 26 | Go to QQ3 |
| Stated water company differs from sample | 25 | Go to Q1b |
| Don't know | 85 | Go to Q1b |
| ASK IF DON'T KNOW/STATED COMPANY DIFFERS AT Q1A OTHERS GO TO FILTER AT Q2 | | |
| Q1b Is your postcode <insert from sample>? | | |
| Yes, same as sample | 1 | GO TO Q1c |
| Incorrect – Enter correct postcode (first part and first digit of second part) | 2 | |
| IF CODE 2 AT Q1b POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE | | |
| ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 | | |
| Q1c In your area, your water company is likely to be [insert name of water company]. Does that sound right? | | |
| Yes | 1 | GO BACK AND CODE Q1A THEN TO FILTER AT Q2 |
| No | 2 | CLOSE |

| | | |
|---|----|---|
| ASK IF CODES 1-10 AT Q1A. OTHERS GO TO FILTER AT Q3 | | |
| Q2 And do they also provide your sewerage services, or do you have a septic tank? INTERVIEWER NOTE: PLEASE CLARIFY IF ASKED. It's a tank in your garden which collects waste from toilets etc and has to be emptied by a specialist company every so often. | | |
| Provide sewerage services | 1 | |
| Have septic tank | 2 | GO TO Q6 |
| ----- Different company provides my sewerage services | 3 | CLOSE |
| ----- Don't know | 85 | GO TO Q6 |
| Q1a2 AND Q1a3 DELETED | | |
| ASK IF CODES 11-24 or 26 AT Q1a. OTHERS GO TO FILTER AT Q6 | | |
| Q3 Do you have a septic tank? | | |
| ----- Yes | 1 | Q6 |
| No | 2 | Go to Q4 if codes 11-24 at Q1a. Go to Q5a if code 26 at Q1a (Hafren) |
| ASK IF CODE 2 AT Q3. OTHERS GO TO FILTER AT Q6 | | |
| Q4 Were you aware that your sewerage services are provided by another company? | | |
| ----- Yes | 1 | Q5a |
| No | 2 | Q5b |

| | | |
|--|----|-----|
| ASK IF CODE 1 AT Q4, or 2 at Q3 if Hafren = water company at Q1a. OTHERS GO TO FILTER AT Q5b | | |
| Q5a And who is your sewerage company? | | |
| ADD IF NECESSARY: the bill from your water company will also say who provides your sewerage services. | | |
| SINGLE CODE IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS | | |
| Anglian Water Services Ltd | 1 | Q6 |
| Dŵr Cymru Cyfyngedig (Welsh Water) | 2 | |
| Northumbrian Water Ltd | 3 | |
| Severn Trent Water Ltd | 4 | |
| Southern Water Services Ltd | 5 | |
| South West Water Ltd | 6 | |
| Thames Water Utilities Ltd | 7 | |
| United Utilities Water Plc (North West Water) | 8 | |
| Wessex Water Services Ltd | 9 | |
| Yorkshire Water Services Ltd | 10 | |
| Hafren Dyfrdwy | 12 | Q5b |
| ----- Stated company differs to sample | 11 | |
| Don't know | 85 | Q5b |
| Scripting note: If water company is Hafren and sewerage company is not either Hafren or Welsh Water, close. | | |
| FOR REST OF SURVEY FOLLOW INSTRUCTIONS BELOW: | | |
| Q1A_26 = Hafren and Q3_2 = Septic tank – allocate to Hafren WaSC sample | | |
| Q1a_26 = Hafren and Q5a_12 = Hafren – allocate to Hafren WaSC sample | | |
| Q1a_26 = Hafren and Q5a_2 = Welsh Water – allocate to Hafren WoC sample (Hafren/Welsh) | | |
| IF Q4_2 (NO) OR Q5A_85 (DON'T KNOW) OR Q5_11 (STATED COMPANY DIFFERS TO SAMPLE) REFER TO SAMPLE AND ASK: | | |

| | | |
|--|-----------------------------|---|
| <p>Q5b Is your postcode <insert postcode from sample>?</p> <p>Yes, same as sample</p> <p>Incorrect – Enter correct postcode (first part and first digit of second part)</p> | <p>1</p> <p>2</p> | <p>Q5c</p> |
| <p>Q5c In your area, your sewerage company is likely to be [insert name of water company]. Does that sound right?</p> <p>Yes</p> <p>-----</p> <p>No</p> | <p>1</p> <p>2</p> | <p>GO BACK & CODE Q5a THEN TO Q6</p> <p>CLOSE</p> |
| <p>ASK ALL</p> <p>Q6 Does your household have a water meter? SINGLE CODE</p> <p>Yes</p> <p>No</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>85</p> | |
| <p>Q7a – Q8b PARKED</p> | | |

Company Information

| | | |
|---|--|--|
| <p>ASK ALL</p> <p>Q9 Thinking now about value for money, how satisfied or dissatisfied are you with the <u>value for money</u> of the <u>water services</u> in your area? SINGLE CODE. READ OUT AND CODE FOR EACH AND THERE SHOULD BE 6 RESPONSE CODES FOR EACH</p> <p>DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (HAVE SEPTIC TANK)</p> <p>Q10 And the sewerage services in your area?</p> <p>Very satisfied 1</p> <p>Fairly satisfied 2</p> <p>Neither satisfied nor dissatisfied 3</p> <p>Fairly dissatisfied 4</p> <p>Very dissatisfied 5</p> <p>Don't know 85</p> | | |
| <p>ASK ALL</p> <p>Q11 We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity? SINGLE CODE ONLY</p> <p>Yes, both gas and electricity 1</p> <p>No – gas and electricity from separate companies 2</p> <p>Don't have mains gas 3</p> <p>Don't know 85</p> | | |
| <p>Q12 Thinking now about other household utility services, how satisfied or dissatisfied are you with the <u>value for money</u> from services such as...?: READ OUT EACH SERVICE & SINGLE CODE.</p> <p>READ OUT SCALE, DO NOT READ OUT NUMBERS</p> | | |

| | | |
|--|--|--|
| <p><i>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.</i></p> <p>a) Your gas service ASK IF CODE 1-2,85 AT Q11</p> <p>b) Your electricity service ASK ALL</p> <p>c) Your broadband services ASK IF CODE 1 AT D4ab</p> <p>d) Your telephone landline services ASK IF CODE 1 AT D4aa</p> <p>e) Council services ASK ALL</p> | | |
| Q13A/B QUESTION PARKED | | |
| <p>ASK ALL</p> <p>Q14 How much do you agree or disagree that the [CODE 2 AT Q2 OR 1 AT Q3 = 'water']/[ALL OTHERS = water and sewerage] charges that you pay are fair? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> <p>Don't know 85</p> | | |
| <p>ASK ALL CODED 1-10 AT Q1A (WaSCs) + Hafren and Hafren WaSC sample, or Hafren and Septic tank sample</p> <p>Q16a How much do you agree or disagree that the [CODE 2 AT Q2 OR 1 AT Q3 = 'water']/[ALL OTHERS = 'water and sewerage'] charges that you pay for are affordable to you? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> | | |

| | | |
|--|----|--|
| Don't know | 85 | |
| ASK ALL CODED 11-24 AT Q1A (WOCs) + Hafren and Welsh WoC sample | | |
| Q16b How much do you agree or disagree that the water charges that you pay for are affordable to you? SINGLE CODE. READ OUT AND CODE FOR EACH AND THERE SHOULD BE 6 RESPONSE CODES FOR EACH | | |
| ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WOCs) + Hafren and Welsh WoC sample | | |
| Q16c And the sewerage charges? | | |
| Strongly agree | 1 | |
| Tend to agree | 2 | |
| Neither agree nor disagree | 3 | |
| Tend to disagree | 4 | |
| Strongly disagree | 5 | |
| Don't know | 85 | |
| ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WOCs) + Hafren and Welsh WoC sample | | |
| Q16d How much do you agree or disagree that the total water and sewerage charges that you pay for are affordable to you? SINGLE CODE. READ OUT IF NECESSARY | | |
| Strongly agree | 1 | |
| Tend to agree | 2 | |
| Neither agree nor disagree | 3 | |
| Tend to disagree | 4 | |
| Strongly disagree | 5 | |
| Don't know | 85 | |
| SWW £50 GOVERNMENT CONTRIBUTION – Q PARKED | | |

Section B: Consumer Rights and Responsibility

| | | |
|--|------------------------------------|---|
| <p>ASK ALL</p> <p>Q18 How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill? READ OUT. SINGLE CODE</p> <p>Very likely Fairly likely Not very likely Not at all likely Don't know</p> | <p>1 2 3 4 85</p> | |
| <p>ASK IF WATER METER (CODE 1 AT Q6). OTHERS GO TO Q20</p> <p>Q19 You said earlier that your household had a water meter, which of the following apply to you? SINGLE CODE</p> <p>Your property already had meter when moved in You asked for a meter to be fitted Had no choice - water company fitted one as part of a metering scheme Other (specify) Don't know</p> | <p>1 2 3 80 85</p> | |
| <p><u>DO NOT</u> ASK SOUTHERN WATER (Q1_6) OR SOUTH EAST WATER (Q1_20) CUSTOMERS</p> <p>ASK IF Q6_2/85 AND IF NOT IN CM POST CODE LIST (SEE Q20 POSTCODE EXCEL FILE SAVED IN SAMPLE & DATA FOLDER)</p> <p>Q20B – IN ADDITION, DO NOT ASK THOSE POSTCODES IN FILE TITLED Q20B ADDITIONAL POSTCODES TO EXCLUDE</p> <p>Q20 Were you aware that ...: SINGLE CODE FOR EACH STATEMENT Scale: 1=Yes, 2= No, 85= Don't know</p> <p>a) If you ask for a meter to be fitted, your water company will install one free of charge</p> | | <p>WILL BE ROUTED FROM POST- CODE</p> |

| | | |
|---|---|--|
| b) You have up to {Text replace: a year/two years} to decide whether you prefer the meter or would like to go back to a water rate charge for your property | | |
| INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is already charged for water via a meter you cannot go back to a water rate charge. | | |
| <p>ASK ALL</p> <p>Q21 Are you aware of or are you currently on [CODE 2 or 26 AT Q1a = 'Welsh Water Assist/WaterSure Wales' /ALL OTHERS = 'WaterSure'] tariff >? This was introduced to help people in low income groups who need to use a lot of water</p> <p>READ OUT. SINGLE CODE</p> <p>Yes, have heard of it but do not need it</p> <p>Yes, have subscribed to it</p> <p>No, but would like to know more</p> <p>No, but do not need it</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>85</p> | |
| <p>ASK ALL, BRING IN RELEVANT CODES AS INDICATED</p> <p>Q22 Are you aware of any <u>other</u> schemes offered by XX Water [or XX Water] which provide lower charges for customers who struggle to afford their bills? IF YES, What are they? DO NOT READ OUT. MULTICODE OK</p> <p>Anglian Water (Q1a/1)</p> <p>Lite social tariff</p> <p>Anglian Water Assistance Fund</p> <p>Aquacare Plus</p> <p>Access to charitable trusts</p> <p>Dwr Cymru (Q1a/2)</p> <p>HelpU social tariff</p> <p>Customer Assistance Fund</p> | | |

| | | |
|--|--|--|
| <p>Northumbrian Water (Q1a/3)</p> <p>SupportPlus Reduced Tariff Scheme</p> <p>SupportPlus Arrears Scheme</p> <p>Severn Trent Water (Q1a/4)</p> <p>Big Difference social tariff scheme</p> <p>Severn Trent Trust Fund</p> <p>South West Water (Q1a/5)</p> <p>WaterCare social tariff</p> <p>Southern Water (Q1a/6)</p> <p>Essentials Social Tariff</p> <p>New Start</p> <p>Support tariff for customers metered under water metering programme</p> <p>Thames Water (Q1a/7)</p> <p>WaterSure Plus social tariff</p> <p>Charitable Trust/ Trust Fund</p> <p>Customer Assistance Fund</p> <p>United Utilities (Q1a/8)</p> <p>Help to Pay Social Tariff</p> <p>Charitable Trust/ Restart Trust Fund</p> <p>Back on Track (Previously Support Tariff)</p> <p>Payment matching scheme for arrears</p> | | |
|--|--|--|

| | | |
|---|---|--|
| Wessex Water (Q1a/9) | Assist social tariff | |
| | Restart | |
| | Restart Plus | |
| Yorkshire Water (Q1a/10) | Water Support social tariff | |
| | Yorkshire Water Community Trust | |
| | Resolve scheme | |
| | | |
| Bournemouth Water (Q1a/11) | WaterCare social tariff | |
| | | |
| Bristol Water (Q1a/12) | Assist social tariff | |
| | Restart | |
| | Restart Plus | |
| | | |
| Cambridge Water (Q1a/13) | Assure social tariff | |
| | NewStart | |
| | Grants for those facing severe financial difficulty | |
| | | |
| Essex & Suffolk Water (Q1a/16) | SupportPlus Reduced Tariff Scheme | |
| | SupportPlus Arrears Scheme | |
| | | |

| | | |
|--|----|-----|
| Here2Help | | |
| <ALL> Other (specify) | | |
| No, not aware of any | | |
| Q24 PARKED | | |
| ASK ALL | | |
| Q25 Are you aware of any additional free services (also known as priority services) offered by your water company, such as large print or braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water? READ OUT. SINGLE CODE | | |
| Yes, have heard of it but do not need it | 1 | |
| Yes, have subscribed to it | 2 | |
| No, but would like to know more | 3 | |
| No, but do not need it | 4 | |
| Don't know | 85 | |
| Q26 AND Q27A/B PARKED | | |
| INTERVIEWER NOTE: If asked after responding, the correct answer is that the sewerage company is responsible for the maintenance of sewerage pipes and drains which serve more than one property, including those within your property boundary. The homeowner is responsible for maintaining a sewer or drain when it serves their property only and is within the boundary of their property | | |
| ASK ALL | | |
| Q28 Have you contacted your water / water and sewerage company in the past 12 months? SINGLE CODE INTERVIEWER PLEASE CONFIRM | | |
| Yes – water and sewerage company | 1 | |
| Yes – water company | 2 | Q29 |

| | | |
|--|----|------|
| Yes – sewerage company | 3 | |
| ----- No | 4 | |
| Don't know | 85 | NQ1a |
| ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ1a | | |
| Q29 What was your most recent contact about? DO NOT READ OUT. MULTICODE OK | | |
| To make a complaint | 1 | |
| To make an enquiry relating to drought/water shortage | 2 | |
| To make an enquiry relating to flooding | 3 | |
| To make an enquiry about sewers and drains (responsibility) | 4 | |
| Billing enquiry | 5 | |
| No supply/supply issue | 6 | |
| To report a leak | 7 | |
| To change to/ask for a water meter | 8 | |
| Water quality | 9 | |
| Water pressure | 10 | |
| Sewerage problem | 11 | |
| To enquire about programme to fit meters | 12 | |
| To enquire about hosepipe ban | 13 | |
| To ask about schemes/help paying bills | 14 | |
| Other (please specify) | 80 | |
| Don't know | 85 | |
| Q32, 33a-c PARKED | | |

| | | |
|---|--|--|
| <p>ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ1a</p> <p>Q30 Thinking about this contact overall how satisfied were you with.... READ OUT EACH STATEMENT & SINGLE CODE. ROTATE STATEMENTS. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS</p> <p>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.</p> <p>a) The ease of contacting someone who was able to help you</p> <p>b) The quality/ clarity of information provided</p> <p>c) The knowledge and professionalism of staff</p> <p>d) The feeling that your contact had been, or would be, resolved</p> <p>e) The way that the water company has kept you informed of progress with your enquiry/complaint/claim</p> | | |
| <p>ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ1a</p> <p>Q31 Taking everything into account, overall how satisfied or dissatisfied were you with this contact? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied</p> <p>Fairly satisfied</p> <p>Neither satisfied nor dissatisfied</p> <p>Fairly dissatisfied</p> <p>Very dissatisfied</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>85</p> | |

| | | |
|---|--|--|
| ASK ALL | | |
| <p>NQ1a Thinking about customer service more generally, including the bills you get, frequency of bills, meter readings and payment options, how satisfied are you with the customer service of your [CODES 11-24 AT Q1a OR HAFREN AND WELSH WATER = 'water'] / [CODES 1-10 AT Q1a OR HAFREN AND HAFREN OR HAFREN AND SEPTIC TANK = 'water and sewerage'] company? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1</p> <p>Fairly satisfied 2</p> <p>Neither satisfied nor dissatisfied 3</p> <p>Fairly dissatisfied 4</p> <p>Very dissatisfied 5</p> <p>Don't know 85</p> | | |
| ASK IF NQ1a=4/5 | | |
| <p>NQ1b Why do you say that you are dissatisfied with the customer service?</p> <p>VERBATIM COMMENT</p> | | |
| Q32 PARKED | | |

Section C: Water on Tap

| | | |
|---|--|--|
| ASK ALL | | |
| <p>Q34 How satisfied are you with the following aspects of your water supply:</p> <p>READ OUT EACH STATEMENT & SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS</p> <p>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.</p> <p>The colour and appearance of your tap water 1</p> <p>Taste and smell of tap water 2</p> | | |

| | | |
|---|----|--|
| Hardness/softness of your water | 3 | |
| The safety of your drinking water | 4 | |
| The reliability of your water supply | 5 | |
| Your water pressure | 6 | |
| ASK ALL | | |
| Q35 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your <u>water</u> supply? SINGLE CODE. READ OUT IF NECESSARY | | |
| Very satisfied | 1 | |
| Fairly satisfied | 2 | |
| Neither satisfied nor dissatisfied | 3 | |
| Fairly dissatisfied | 4 | |
| Very dissatisfied | 5 | |
| Don't know | 85 | |
| Q36b & Q37a/b & Q38 PARKED | | |
| ASK ALL | | |
| NQ2 How confident are you that in the longer term your water supply will be available without restriction, that is, not subject to hosepipe bans or other restrictions on use? | | |
| Very confident | 1 | |
| Fairly confident | 2 | |
| Neither confident nor unconfident | 3 | |
| Fairly unconfident | 4 | |
| Very unconfident | 5 | |
| Don't know | 85 | |

Section D: Sewerage system that works

INTERVIEWER NOTE: If asked after response has been given, none of these are ok

ASK IF Q2/1 or 85 OR Q3/2 (NO SEPTIC TANK)

Q39 How satisfied are you with your sewerage company's management of the following aspects of their sewerage service.....: READ OUT EACH STATEMENT AND SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS

Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85 = don't know 98 = not applicable.

a) Reducing smells from sewage treatment works

b) Maintenance of sewerage pipes and treatment works

c) Cleaning waste water properly before releasing it back into the environment

d) Minimising sewer flooding

ASK IF Q2/1, 85 OR Q3/2 (NO SEPTIC TANK)

Q40a Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service? SINGLE CODE. READ OUT IF NECESSARY

Very satisfied

1

Fairly satisfied

2

Neither satisfied nor dissatisfied

3

Fairly dissatisfied

4

Very dissatisfied

5

Don't know

85

Q40b PARKED

| | | |
|--|--|--|
| <p>ASK ALL</p> <p>Q40c Now thinking about your overall experience of [CODE 2 AT Q2 OR 1 AT Q3 = 'water supply']/[ALL OTHERS = 'water and sewerage services'] – including the provision of [CODE 2 AT Q2 OR 1 AT Q3 = 'water']/[ALL OTHERS = 'water and sewerage'] as well as charges, customer services and billing - how satisfied or dissatisfied are you? SINGLE CODE. READ OUT IF NECESSARY</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>85</p> | |
| <p>ASK IF <u>CODE 4 OR 5</u> AT Q40c. OTHERS GO TO Q41</p> <p>Q40d Did any of the following influence your overall satisfaction? READ OUT. MULTICODE OK. RANDOMISE LIST</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>80</p> <p>87</p> | |

| | | |
|---|--|--|
| <p>ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY</p> <p>Q41 Now, thinking about other household services you receive, how satisfied or dissatisfied are you with....?: READ OUT EACH SERVICE & SINGLE CODE</p> <p><i>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.</i></p> <p>a) Your gas service ASK IF CODE 1-2 AT Q11</p> <p>b) Your electricity service ASK ALL</p> <p>c) Your broadband services ASK IF CODE 1 at D4ab</p> <p>d) Your telephone landline services ASK IF CODE 1 at D4aa</p> <p>e) Council services ASK ALL</p> | | |
| <p>ASK ALL</p> <p>Q42 How much do you agree or disagree that your water [IF CODES 1-10 AT Q1A AND Q2/1, 85 OR HAFREN AND HAFREN also insert 'and sewerage'] company cares about the service it gives to customers? READ OUT IF NECESSARY. SINGLE CODE</p> <p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> <p>Don't know 85</p> | | |

| | | |
|---|--|---|
| <p>ASK ALL</p> <p>Q43 How much do you agree or disagree that your [IF CODE 1 AT Q11 = 'energy'; IF CODE 2 AT Q11 = 'gas or electricity'; IF CODE 3/85 AT Q11 = 'electricity'] company cares about the service it gives to customers? READ OUT. SINGLE CODE</p> <p>Strongly agree</p> <p>Tend to agree</p> <p>Neither agree nor disagree</p> <p>Tend to disagree</p> <p>Strongly disagree</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>85</p> | |
| <p>ASK ALL</p> <p>Q44a How much do you trust your [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a OR HAFREN + WELSH OR HAFREN + SEPTIC TANK = 'water'] / [ALL OTHERS = 'water and sewerage'] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all</p> <p>Do not trust them at all</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>85</p> | <p>Q44b</p> <p>Q45</p> <p>Q44c</p> <p>Q44c</p> <p>Q45</p> |

| | | |
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| <p>ASK IF CODES 1-4 AT Q44a. OTHERS GO TO Q44c</p> <p>Q44b Why do you give a score of <insert code from Q44a>? TYPE IN VERBATIM</p> <p>Don't know</p> | 85 | |
| <p>NEW QUESTION:</p> <p>ASK IF CODES 9-10 A Q44a. OTHERS GO TO Q45</p> <p>Q44c Why do you give a score of <insert code from Q44a>? TYPE IN VERBATIM</p> <p>Don't know</p> | 85 | |
| <p>ASK ALL</p> <p>Q45 How much do you trust your [IF CODE 1 AT Q11 = 'energy'; IF CODE 2 AT Q11 = 'gas or electricity'; IF CODE 3 AT Q11 = 'electricity'] company? Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all</p> <p>Do not trust them at all</p> <p>Trust them completely</p> <p>Don't know</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>85</p> | <p>Q45a</p> <p>Q45a</p> <p>Q45a</p> <p>Q45a</p> <p>Q48</p> <p>Q48</p> <p>Q48</p> <p>Q48</p> <p>Q45b</p> <p>Q45b</p> <p>Q48</p> |
| <p>NEW QUESTION:</p> <p>ASK IF CODES 1-4 AT Q45. OTHERS GO TO Q45b</p> <p>Q45a Why do you give a score of <insert code from Q45>? TYPE IN VERBATIM</p> <p>Don't know</p> | 85 | |

| | | |
|---|---|--|
| <p>NEW QUESTION:</p> <p>ASK IF CODES 9-10 AT Q45. OTHERS GO TO Q48</p> <p>Q45b Why do you give a score of <insert code from Q45>? TYPE IN VERBATIM</p> <p style="text-align: right;">Don't know</p> | 85 | |
| <p>Q46 AND Q47 PARKED</p> | | |
| <p>ASK ALL</p> <p>Q48a If it were possible to choose your water supplier, on a scale of 0-10, where 0 means you wouldn't be likely to recommend, and 10 means you would be extremely likely to recommend, taking everything into account, how likely would you be to recommend ['insert code given at Q1a'] to friends and family as a provider of water (WaSCs without septic tank (Q2/1, 85) OR HAFREN AND HAFREN: and sewerage) services? SINGLE CODE ONLY</p> <p style="text-align: right;">Not at all likely to recommend</p> | <p>0</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>Extremely likely to recommend 10</p> | |
| <p>ASK ALL WoCs (Q1a/11-24 AND HAFREN + WELSH) without septic tank (Q3/2)</p> <p>Q48b</p> <p>And on the same scale, how likely would you be to recommend ['insert code given at Q5a'] to friends and family as a provider of sewerage services?</p> <p style="text-align: right;">Not at all likely to recommend</p> | 0 | |

| | | |
|----------------------|----------------------------------|--|
| | 1 | |
| | 2 | |
| | 3 | |
| | 4 | |
| | 5 | |
| | 6 | |
| | 7 | |
| | 8 | |
| | 9 | |
| | Extremely likely to recommend 10 | |
| Q154 AND Q155 PARKED | | |

Section E: Speaking up for Water Consumers

| | | |
|------------------|--|--|
| Q49 – Q54 PARKED | | |
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Section F: Background

And finally a few questions about you. These questions will assist with us with analysing the results by different demographics to ensure CC Water fully understand views by all household types

| | | |
|---|--|--|
| <p>READ OUT: The next few questions are about your occupation. These questions will assist with us with analysing the results by different demographics to ensure CC Water fully understand views by all household types</p> | | |
| <p>ASK ALL</p> <p>Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job.</p> <p>D5 Do you (did you) work as an employee or are you (were you) self-employed? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Employee 1 D6</p> <p>Self-employed with employees 2 D7</p> <p>Self-employed/freelance without employees 3 D9</p> <p>Not applicable - Long term unemployed/never worked 4 D3</p> <p>Not applicable - Full time student 5 D3</p> | | |
| <p>ASK ALL EMPLOYEES (D5/1)</p> <p>D6 How many people work (worked) for your employer at the place where you work (worked)? READ OUT IF NECESSARY</p> <p>1-24 1 D8</p> <p>25 or more 2</p> | | |
| <p>ASK ALL EMPLOYERS (D5/2)</p> <p>D7 How many people do (did) you employ?</p> <p>1-24 1 D8</p> <p>25 or more 2</p> | | |

| | | |
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| <p>ASK ALL EMPLOYEES (D5/1-2)</p> <p>D8 Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)</p> <p>Yes</p> <p>No</p> | <p>1</p> <p>2</p> | <p>D9</p> |
|--|-------------------|-----------|

| | | |
|---|---|--|
| <p>ASK ALL EMPLOYED (D5/1-3)</p> <p>D9 What do you do for work? If you are not working now, what did you do in your last job?</p> <p>SINGLE CODE ONLY.</p> <p>DO NOT READ OUT – USE PROMPTS WHERE NECESSARY.</p> <p>Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer</p> <p>Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse</p> <p>Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive</p> <p>Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver</p> <p>Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant</p> <p>Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff</p> <p>Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican</p> <p>Traditional professional occupations such as: accountant – solicitor – medical practitioner – scientist – civil/mechanical engineer</p> <p>Refused</p> <p>INTERVIEWER NOTE - IF RESPONDENT REFUSES READ OUT: I would like to reassure you that this information is only being collected to make sure we have a good mix of people included in the survey, it will not be used for any other purpose. On this basis would you be happy to tell me about the sort of work you do, or if you're not working now, what you did in your last job?</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> | |
|---|---|--|

| | | |
|---|----|--|
| | 7 | |
| | 8 | |
| | 86 | MAX 10 REFUSALS WASC / WOC – THEN MOVE SEC TO FRONT |
| ASK IF CODE 5-8 AT D2. OTHERS GO TO Q55 | | |
| D3 Are you retired? SINGLE CODE | | |
| Yes | 1 | |
| No | 2 | |
| Refused | 86 | |

| | | |
|---|----|--|
| ASK ALL | | |
| Q55 How would you describe your ethnic background? | | |
| PROMPT IF NECESSARY. SINGLE CODE | | |
| White: British | 1 | |
| White: Irish | 2 | |
| White: Any other White background | 3 | |
| Mixed: White and Black Caribbean | 4 | |
| Mixed: White and Black African | 5 | |
| Mixed: White and Asian | 6 | |
| Mixed: Any other Mixed background | 7 | |
| Asian or Asian British: Indian | 8 | |
| Asian or Asian British: Pakistani | 9 | |
| Asian or Asian British: Bangladeshi | 10 | |
| Asian or Asian British: Any other Asian background | 11 | |
| Black or Black British: Caribbean | 12 | |
| Black or Black British: African | 13 | |
| Black or Black British: Any other Black background | 14 | |
| Chinese | 15 | |
| Other | 80 | |
| Refused | 86 | |

| | | |
|--|--|--|
| <p>ASK ALL</p> <p>Q56 Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do? MULTICODE OK FOR CODES 1/2</p> <p>Yes (self) 1 Yes (other) 2 No 3 Don't know/refused 85</p> | | |
| <p>ASK ALL</p> <p>Q57 Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household? READ OUT SINGLE CODE</p> <p><i>[Scale: 0 = none, 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 86= refused.</i></p> <p>a) Adults i.e. 18 years and over b) Children aged 6 – 17 c) Children aged 0-5</p> | | |

| | | |
|--|---|--|
| <p>ASK ALL</p> <p>Q57a We would like to make sure that we take account of the views of people of all incomes. Could you tell me which of the following ANNUAL income bands your household falls into? Please take account of the income of all those in the household (before tax and national insurance) and include any pensions, benefits or extra earnings.</p> <p>Less than £10,000</p> <p>£10,000 to £19,999</p> <p>£20,000 to £29,999</p> <p>£30,000 to £39,999</p> <p>£40,000 to £49,999</p> <p>£50,000 to £74,999</p> <p>£75,000 to £99,999</p> <p>£100,000 or more</p> <p>Don't know</p> <p>Refused</p> | <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>85</p> <p>86</p> | |
| <p>ASK ALL</p> <p>Q58 And are you/someone in your household currently receiving any benefits or tax credits? SINGLE CODE</p> <p>Yes</p> <p>No</p> <p>Don't know</p> <p>Refused</p> | <p>1</p> <p>2</p> <p>85</p> <p>86</p> | |
| <p>ASK ALL</p> <p>Q59 What type of accommodation do you live in?</p> <p>READ OUT SINGLE CODE</p> <p>Owner occupied</p> <p>Private rental</p> <p>Council tenant</p> | <p>1</p> <p>2</p> <p>3</p> | |

| | | |
|---|----|--|
| Housing Association tenant | 4 | |
| Leaseholder | 5 | |
| Don't know | 85 | |
| Refused | 86 | |
| <hr/> | | |
| ASK ALL | | |
| Q60 Would you say you live in an urban or rural area? READ OUT.SINGLE CODE | | |
| | 1 | |
| Urban | 2 | |
| Rural | 3 | |
| Suburban/semi rural | 85 | |
| Don't know | | |
| <hr/> | | |
| ASK ALL | | |
| Q61 Do you have access to the internet? | | |
| Yes | 1 | |
| No | 2 | |
| Don't know | 85 | |
| Refused | 86 | |
| <hr/> | | |
| ASK IF CODED 3 AT Q21a OR Q25a. OTHERS GO TO CLOSING STATEMENT | | |
| Q62 You said you would like to know more about additional services from your water company. To find out more, you can call ['insert code given at Q1a'] on [RELEVANT NUMBER FROM TABLE BELOW]. | | |

| | | |
|--|---|--|
| ASK ALL | | |
| Q63 Would you be happy to be re-contacted for future research projects on behalf of CCWater? | | |
| Yes | 1 | |
| No | 2 | |

Thank you for sparing the time to take part.

This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.

Should you wish to contact the Consumer Council for Water you can call their national enquiries line on 0121 345 1000 or visit their website at www.ccwater.org.uk

Should you want to contact the MRS (the Market Research Society) to verify that DJS Research comply with the code of conduct you can call them on 0500 39 69 85.

CONSUMER COUNCIL FOR

CYNGOR DEFNYDDWYR



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